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WORLD FOOD SITUATION 1946

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Approved by Outlook and Situation Board
February 6, 1946

THE WORLD FOOD SITUATION - 1946*

SUMMARY

Recent deterioration of the food crops of the 1945-46 season has reduced the per capita world output of food products to a level about 12 percent below the prewar average of 1935-39. The wheat crop in Argentina is now estimated to be only about two-thirds of the amount anticipated last fall and Canada's 1945 wheat crop was cut 10 percent below earlier indications. Typhoons and unfavorable weather during harvest reduced Japan's rice crop, and the rice crops of the surplus producing areas of southeastern Asia are below earlier estimates. Serious drought has sharply reduced food crops in the Union of South Africa, and drought is causing serious concern in southern India. In contrast to the decline in production of food products, food rations in many of the deficit areas were liberalized following VJ-Day in anticipation of larger imports of food than can be met from available supplies in exporting countries. Reduced production and liberalized rations have resulted in larger than usual proportion of the world food supply being consumed in the first half of the year and some restrictions of rations over large areas are imperative if serious food crises are to be avoided between now and the new harvest.

The gravity of the food situation is further complicated by the fact that most of the greatest reductions in production have been in areas that are normally deficit food producers. Despite a much larger than usual flow of food from the surplus to the deficit food producing areas, there remains wide variation in the quantities of food available for consumption in the different countries, and rations in several countries are near starvation levels.

The greatest decline in food consumption as compared with prewar is in the ex-enemy countries. Consumption levels in the liberated countries are also somewhat below prewar, but in general they were above wartime levels for the first half of the year. Even greater movement of food products into these areas will be required in the last half of the 1945-46 consumption year if the present consumption levels in these deficit areas are to be maintained. It is doubtful, however, if supplies available for export during this period are sufficient even to maintain the rate of movement attained during the first half of the year.

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* The food production and consumption year varies somewhat from region to region, but in general this report is concerned with food consumption in the period from August 1945 until the 1946 harvest becomes available for consumption and the outlook for food production in the 1946-47 consumption year.

These conclusions, which take into consideration probable and prospective food supplies in all areas of the world, are based upon agricultural reports of foreign governments; special inquiry on the food situation by United States foreign service officers stationed abroad; and information collected by United States Government officials traveling in countries where food output has declined most sharply.

The severe drought and the results of war devastations in continental Europe reduced farm production of food products about 25 percent below prewar, and food production on a per capita basis is somewhat lower than it was in 1919. A prolonged and extensive drought in French North Africa has reduced food production to about half of prewar levels, and instead of being a net exporter of food during the current year it is requiring large amounts of imports. A serious drought is also sharply curtailing the food output in the Union of South Africa, and crop prospects for the 1945-46 harvest are especially poor.

Shortage of fertilizers and labor, and unfavorable weather for maturing of the rice crop have reduced food production in Japan to only slightly over three-fourths of prewar and the seriousness of the food situation in that country has been further increased by the marked drop in the quantity of fish available for consumption. Many other areas of the Far East also have experienced large declines in food production, particularly the surplus rice-producing areas of southeastern Asia, where production during 1945-46 is estimated to be little if any above domestic needs. This shortage of rice for export makes the food situation unusually critical in those areas normally depending upon imports for a part of their food supply. It is estimated that the quantity of rice moving into international trade from this area will be less than one-fourth of the 8 million tons which was exported before the war.

Other areas in which food production is below average include Australia, where production has only partially recovered from the extensive droughts of 1944-45, and sections of Latin America, which were also seriously hit by drought during the first half of 1945.

The United States and Canada, the British Isles, and the Middle Eastern countries and portions of Latin America are the only areas where food production in 1945 was above the prewar average. Production in Russia has increased considerably from the low levels of 1943 but are still somewhat below prewar. In India and China, food production was slightly below the prewar average. Drought in the southern part of India in recent weeks has reduced winter crop prospects in that area and is resulting in a tight food situation in the deficit areas of that country. In the areas of China formerly occupied by the Japanese, food production was spotted because of droughts, and in Manchuria and Formosa production was reduced by war.

Production of nearly all staple food products during the 1945-46 season is below prewar. The decline in wheat production amounts to about 8 percent, rye 15 percent, rice 16 percent, and sugar 18 percent. Sharp reductions also have occurred in the production of fats and oils, eggs, meats, and dairy products in many of the principal producing countries. The world production of all food products at the farm level has been somewhat less than the declines in these percentages indicate, however, as larger percentages of some of the above products have been used for food on farms, a much larger proportion of the crops ordinarily grown for feed have been utilized for food, and there has been an expansion in the acreage of millets, cassava, sweetpotatoes, and vegetables which can be grown quickly for food products. A review of the caloric value of food products produced for food in the different countries indicates that world production of all foods in 1945-46 was about 5 percent less than in prewar. However, if allowance is made for the increase in population from prewar to date, the food production on a per capita basis is about 12 percent lower.

This review of the production and utilization of food products in different regions of the world indicates that the shortage of food is likely to be felt most seriously during the first half of 1946. The movement of vegetable oils from the Pacific area has been started, and although the quantity shipped to date has been very small, the volume should increase as the year progresses. Supplies of sugar are also likely to increase from the present low point when the larger Cuban crop is processed, and the shortage should gradually decrease when 1946-47 supplies become available, as present prospects favor a substantial increase in the production. It is also probable that the shortage of wheat, rye, and barley will be relieved considerably as the new European and North African crops are harvested.

In Western Europe an increased acreage was planted under favorable conditions last fall, and the present condition of the crops is much better than a year ago. This may be partially offset, however, by further decreases in acreage in Eastern Europe and in North Africa. In the surplus producing areas of southeastern Asia a considerable increase in acreage of rice which will be harvested from November 1946 to March 1947 is indicated.

While production of important food crops will undoubtedly increase in 1946-47 unless another very unfavorable season is experienced over large areas, it is certain that production will still be somewhat below prewar levels, especially if allowance is made for the expansion in population. Moreover, reserve stocks will be low, and food crops will necessarily continue to provide a larger than usual part of the diet in many areas, as the expansion in the production of livestock products will occur much more slowly than the expansion of crops. Very little progress is expected to be made in the expansion of livestock production in 1946.

In fact the output of livestock products may be further reduced because of the shrotage of feed grains and the necessity to utilize a larger proportion of feed grains to offset the shortage of food grains this year.

The world output of meat, dairy, and poultry products was at high levels from 1938 through 1944, but diminishing supplies of feed, or loss of livestock and unfavorable pasturage conditions have since brought some reduction in nearly all countries. Even in North America, where feed production has been at a relatively high level, livestock numbers declined slightly during 1945 and production is expected to show little or no increase in 1946.

Supplies of butter entering world trade in 1946 will be about half as large as the average annual prewar exports. The expansion of cheese production in the exporting countrues has been encouraged at the expense of butter production in order to relieve the acute shortage of other high protein foods. Quantities of cheese entering world trade have been in excess of prewar but have been short of demand. In view of the continued shortage of meats, the high demand for cheese is expected to continue throughout 1946. World egg production in 1946 will be somewhat less than last year and about 5 percent below prewar, because of the sharp decline in output of European countries. Egg production in Canada and United States is expected to decline in 1946 but will be much above prewar, and considerable quantities of shell and dried eggs will be exported to European countries.

A prospective increase in the fish catch offers the only possiblility of increase in animal proteins during 1946. With the reopening of the fish grounds of the North Atlantic, those European coutries where fish normally make up a large part of the diet, are making strong efforts to rehabilitate their fish industries. Iceland's return to the production of salt fish will increase the production in 1946 substantially over that of the war years, and the prospects are for some increase in the production of canned fish.

Food Situation by Regions and Countries

In the following section the food situationis discussed by major geographic regions and by countries. The countries of each region, shown on opposite page, were selected partially because of countries with more or less common types of agriculture and uniform habits of food consumption. No report is made on the food situation in Central Africa because of lack of data. Brief summaries of the food situation have been prepared for each region. The food production from prewar to 1943 and 1945 and the relative importance of production in each region is shown in Chart I.

The food situation varies considerably from country to county within regions, and these variations are brought out in the individual country discussions. In each of the major countries the discussion has been accompanied by a table of production, domestic disappearance and trade in food products for prewar years and preliminary estimates of production and exports for latest years are shown.

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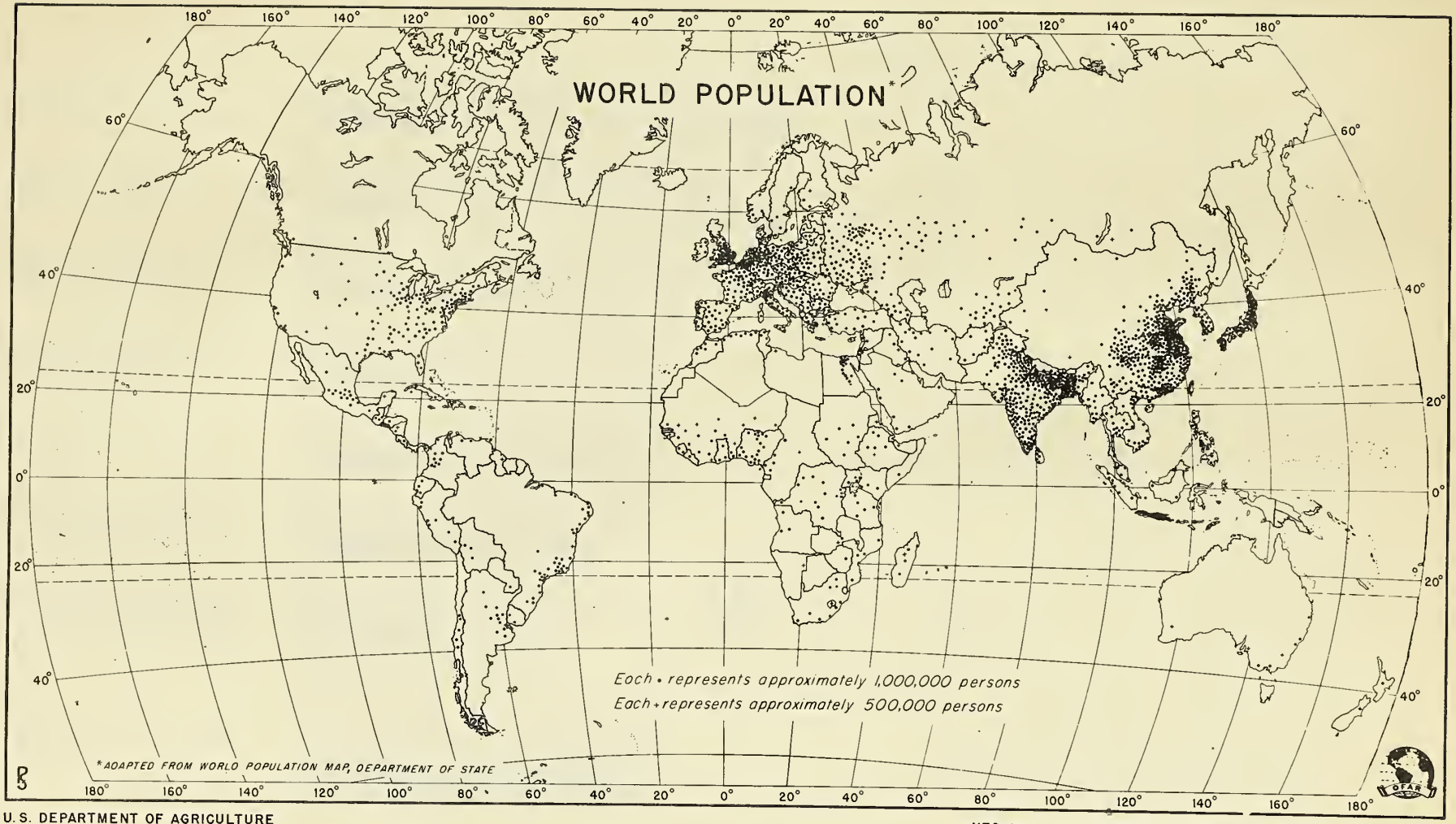

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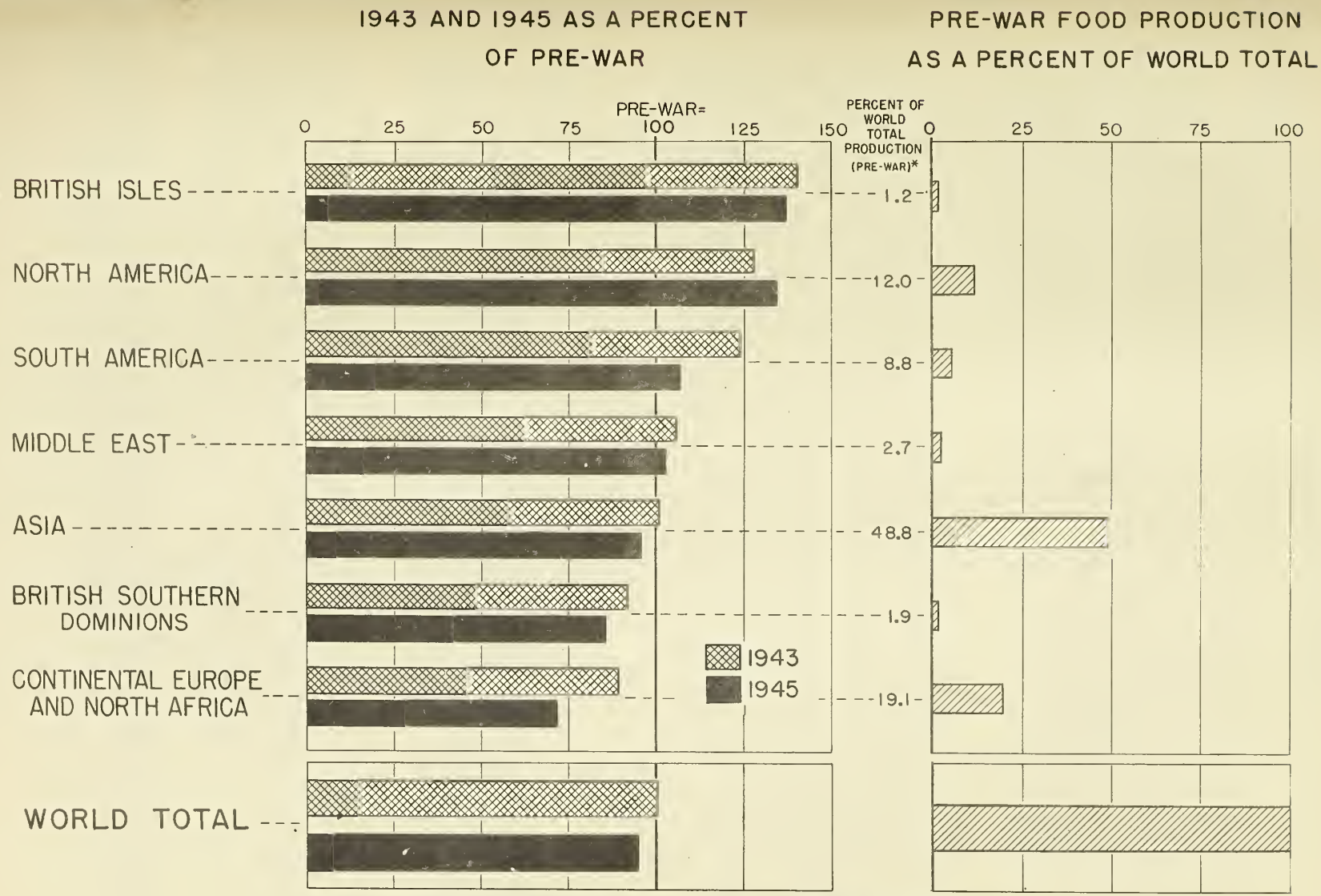
Areas of food shortages, such as Europe and Japan, are densely populated and the people depend on outside sources for a considerable amount of food. Although India is nearly self-sufficing in food, a drought in the densely populated areas of southern India is causing serious shortages.

WORLD FOOD PRODUCTION



*MOST OF THE REMAINDER OF THE TOTAL WAS PRODUCED BY U.S.S.R. WHERE WARTIME STATISTICS ON FOOD PRODUCTION HAVE NOT BEEN PUBLISHED

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Most of the major wartime changes in food production among the various parts of the world had occurred by 1943; and, in the main, these changes were maintained through 1945. In 1945, however, crop production in many parts of the world was seriously reduced by unfavorable weather conditions and by the disruptions of war. The decline in total world production, accompanied by the upward trend in population, has resulted in a per capita world food supply in 1946 of about 12 percent below prewar (1935-39).

CANADA AND THE UNITED STATES

Summary

Canada and the United States are the principal sources of surplus food products during 1945-46 and are the only major exporting areas where agricultural production was above average. In the United States, food production continued at about the same high levels as of the past 3 years, but in Canada production was reduced somewhat because of the smaller wheat crop. These countries are exporting large quantities of food products during 1945-46, both out of current production and out of stocks, so that the reserve supply of foods at the beginning of the 1946-47 year, particularly reserve supplies of wheat, will be substantially below those of any recent year.

Food production in this area in 1946-47, assuming normal weather conditions, will continue at high levels, but some decline in output may occur and supplies available for export may be decidedly smaller because of the large exports from reserve stocks in 1945-46. In Canada, wheat production was below average in 1945, but some increase in spring wheat acreage may occur in 1946 because of favorable prices. The sharp reduction in hog numbers in 1945 will result in some further decrease in meat production, and milk production may be slightly lower. In the United States, wheat production may be below the record crop of 1945. Some decline is also expected in the production of eggs, but both beef and pork production is expected to be slightly larger.

Canada

Summary

The total quantity of Canadian food supplies moving into domestic consumption during the year July 1, 1945, to June 30, 1946, will be at approximately the same level as the prewar average, that is in the neighborhood of 3,100 calories per capita. This will be somewhat below the 1944 average which was estimated at 3,280 calories per capita.

Though adverse weather conditions caused sharp reductions in Canadian crop yields during 1945, some surpluses are available and Canada had large exportable surpluses at the beginning of the season that will be important in helping to meet the acute needs for foodstuffs in other continents. Wheat, meat, dairy-product and poultry-product exports will continue to be greatly above prewar. Fruit exports will, however, be lower during 1945-46 than they were last year or prewar.

A continuation of the trend back toward the prewar production pattern is expected in 1946, with an increased acreage being planted to spring wheat and a decline in output of such commodities as bacon, cheese, dried milk, vegetables for dehydration, and flaxseed.

Background.—Canada's agriculture has been an important source of varying types of food supplies during the war. For example, not all of her great wheat production capacity was needed during the middle of the war period. Consequently, the area in wheat was reduced from 28,726,000 acres in 1940 to 16,850,000 acres in 1943, and many wheat farmers turned to production of feed grains and hogs. At the same time Canada expanded production of various other foods to the utmost, including cheese, canned milk, canned salmon, eggs, poultry meat, canned tomatoes, and various dehydrated vegetables.

Canada reached her wartime meat production peak in 1944, when the edible weight of pork from all hogs slaughtered reached 1,503,000,000 pounds[1] and pork exports reached 717,714,000 pounds as compared with the average of 179,630,000 pounds for the 1935-39 period. Pork production in 1945 showed a decline of nearly 33 percent. Due to the continued rise in beef production, however, the total meat output in 1945 was only about 15 percent below 1944.

1945-46 Food Situation.--Approximately 35 million bushels of wheat and over 1 million barrels of flour were being shipped from Canada monthly during the latter part of 1945. Taking the 1945 and 1946 carry-overs into account, possibly not more than 350 million bushels may be available for export in 1945-46, as compared with 343 million bushels exported last year. A slightly larger amount might be made available by reducing domestic carry-over to the lowest level on farms as well as in elevators, that is by scraping the very bottom of the Canadian wheat bins. In either case the export shipments will be reduced sharply before the 1946 crop becomes available. It appears that the amounts exportable during the summer months of 1946 may drop to the lowest level since the defeat of Germany.

Utilization of livestock feedstuffs during the 1945-46 year will be at a high level in order to meet overseas requirements for meat and dairy products. It is estimated that supplies will be barely adequate to feed Canada's livestock, leaving only 15 million bushels of oats, and no barley for export. Export of grain for feed is now prohibited.

The Canadian consumption of potatoes during 1945-46 is expected to be 43,400,000 bushels, compared with the average of 42,600,000 bushels in the preceding 5-year period and a prewar average of 38,809,000 bushels. The Canadian crop in 1945 was estimated at 60,392,000 bushels, or nearly 20,000,000 bushels below 1944 production. It was the smallest crop since 1938, and will necessitate net imports of nearly 10,000,000 bushels of table-stock potatoes to meet estimated domestic requirements. Most of these will be imported from the United States.

Canada, by the continuance of meat rationing so as to restrict meat consumption to the 1942 and 1943 level, will have nearly 800 million pounds of meat available for export in the calendar year 1946. Of a

1/ Excluding offal and fat.

probable total supply of something less than a billion pounds of pork, nearly 600 million pounds would be consumed domestically, making 400 million pounds, or less, available for export. Most of the pork exported would be in the form of bacon or ham and would, under the present United Kingdom bacon agreement, go to the United Kingdom to help meet that country's bacon ration. By reducing the total domestic beef consumption from approximately 850 million pounds in 1945 to 763 million pounds in 1946, an estimated total of 317 million pounds of beef would be available for export, compared with exports of approximately 252 million pounds in 1945.

Canned meat, largely beef for relief purposes, is being shipped abroad at the rate of 23 million pounds per month. Belgium, Czechoslovakia, France, Greece, and Poland are among the principal beneficiaries. Fresh beef is shipped largely to the United Kingdom or British Colonies.

Both production and domestic consumption of milk and milk products as a whole may be expected to remain at approximately the same levels for 1946 as they were in the previous year. Milk production in 1945 was about 17-1/2 billion pounds, approximately the same as the record production of 1944 and about 20 percent above the prewar level. Domestic consumption of milk and milk products, excluding butter, was 21 percent above prewar in 1945. During the autumn of 1945 a rise in fluid milk consumption took place, which represented an increase of 10 percent above the same month in 1944. At the same time there were production declines as follows: evaporated milk, 15 percent; whole milk powder, 23 percent, and cheddar cheese, 26 percent.

In 1945 Canada exported dairy and poultry products as follows:[1/] cheese, 125 million pounds; dried milk, 13 million pounds, condensed milk nearly 20 million pounds; evaporated milk, 65 million pounds, butter 5 million pounds; eggs 120 million dozen; poultry meat, 13 million pounds. By continuing the rationing of butter and control over utilization of milk, a slightly increased quantity of butter and 120 million pounds of cheese may be available for export in 1946. Though chick hatches in 1945 were lighter than in 1944, it is estimated that 80 to 90 million dozen eggs and 6 or 7 million pounds of poultry meat will also be available for export during the calendar year 1946. The British Ministry of Food has undertaken to purchase 1,750,000 cases (30 dozen in a case) of shell eggs and 11,200,000 pounds of dried eggs (equivalent to 33,600,000 dozen) from Canada in 1946.

The foodstuffs that are now most scarce in Canada are fats and oils, sugar, and fruits and vegetables. Fats-and-oils consumption per capita continues at about the same rate as in the United States and sugar slightly below. The 1945 harvests were low for all fruits except berries, and the apple crop was a virtual failure in Nova Scotia, Quebec, and Ontario. Reduced acreages of vegetables in 1945, together with low yields per acre, have created a vegetable shortage that is being felt in much of Canada.

1/ Preliminary estimates.

Production Outlook for 1946.--Official production goals in Canada for 1946 include increases above 1945 for feed grains, hogs, butter, potatoes, sugar beets, and flaxseed. Because of the relative price level and preference of prairie farmers for growing wheat instead of feedgrains or flax, spring wheat acreage may be increased 5 or 10 percent above that of 1945. Maintenance of present milk production is recommended, though the 1946-47 production of livestock products may generally be dependent upon the amount of feedstuffs harvested in 1946, and upon pasture conditions.

Reduced plantings of beans and tomatoes for canning, and such vegetables for drying as cabbage, carrots, and beets are expected because of the reduced military and British demand.

CANADA: Estimated production, domestic disappearance and export surpluses, 1935-39 average and 1945-46.

Commodity	Production		Domestic disappearance		Net exports	
	1935-39 average	1945-46 1/	Prewar	Prospective 1/ 1945-46	1935-39 average	Prospective 1/ 1945-46
Wheat (million bu.)	312	306	115	175	180	350
Oats (million bu.)	338	382	320	425	14	15
Barley (million bu.)	89	158	74	175	14	-
Potatoes (million bu.)	64	60	39	42	1/ .5	2/10
Bacon & pork (million lb.) (carcass wt.)	3/383	746	208	281	180	465
Beef & veal (million lb.) (carcass wt.)	3/460	914	447	597	11	317
Mutton & lamb (million lb.) (carcass wt.)	3/ 34	46	34	35	.25	10
Creamery butter (million lb.)	255	4/310	247	4/304.5	5.5	4/ 5.5
Cheddar cheese (million lb.)	120	4/180	39	4/ 50	80	4/130
Eggs (million doz.)	220	4/379	211	1/ 292	7	4/ 87
Poultry meat (million lb.)	198	4/288	194	4/ 281	3	4/ 6.8
Evaporated milk (" whole)	90	5/170	68	5/ 120	22	5/ 50
Condensed milk (" ")	9	4/ 30	7	4/ 12	2	4/ 18
Whole milk powder	5	5/ 9	1	5/ 6	4	5/ 3

1/ Preliminary estimates; adjustments made in consumption and trade estimates for changes in stocks.
2/ Table stock only; net imports estimated at nearly 10 million bushels, 1945-46.
3/ Inspected slaughter only; 1946 estimates; based on forecasts made at Dominion-Provincial Conference on Agricultural Program held December 1945.
4/ Recommendations for calendar year 1946, based on forecasts at Dominion-Provincial Conference.
5/ Estimates for calendar year 1946; adjusted to take account of declining output as indicated in last months of 1945.

United States*

Summary.

Total food supplies in the United States continue at record levels. Food production in the 1945-46 crop year is about a third above the prewar average (1935-39). Prospects are favorable for continued large production in 1946 unless, of course, weather conditions should be much below average. Both food and feed-grain production were high in 1945, so livestock production probably will be maintained at a high level in 1946.

Civilian food consumption per capita in the United States in 1946 is expected to exceed that of any previous year, barring unusually poor crops. Despite the increased number of people eating out of civilian supplies as demobilization progresses, the per capita rate of food consumption will be higher than last year because of military cutbacks. Procurement of food by the armed services probably will be only a fourth of the 1945 takings. Food exports and shipments to insular possessions in calendar 1946 probably will be much the same as in 1945, unless some restrictions are replaced on United States civilian demand.

During the war, huge quantities of food were supplied to our armed forces and Allies and at the same time civilian per capita consumption increased. This was accomplished through a large expansion of food production. By 1941, the volume of food production for sale and farm-home consumption had risen to 15 percent above the average of the years 1935-39, and thereafter it increased steadily to attain a record level in 1944 that was 38 percent above prewar. This expansion of production occurred in the face of a decrease in the farm labor force and was aided by unusually favorable weather throughout most of the country. The greatest increases in food production were in livestock products, wheat, and truck crops.

During the prewar years 1935-39, about 97 percent of each year's supply of food was consumed domestically, and about 3 percent was exported. The percentage of the total food supplies consumed by civilians during 1944 and 1945 declined to about 80 percent; the armed forces took about 13 or 14 percent, and 6 or 7 percent was purchased for export. In these years, the Government stocks, which had been built up in 1942 and 1943, were considerably depleted and contributed materially to food shipments to liberated areas. From the beginning of 1945 until the end of the war the armed forces were taking almost one-fifth of the total food supply, and other Government purchases, mostly for lend-lease, were still large. At the end of the war, however, military cutbacks changed the whole food-supply picture and permitted immediate increases in the civilian supplies of many foods, particularly for the last quarter of 1945. Exports of many foods declined during the summer and were further reduced when the lend-lease program was discontinued. During the past few months, however, large

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* Prepared in Div. Statistical
and Historical Research
Bureau of Agricultural Economics

quantities of wheat, lard, meats, beans, peas, and evaporated milk have been shipped, although less for some of these than allocated.

1945 Production and 1946 Outlook.—Production of over 22 billion pounds of meat (dressed-meat basis) in the United States in 1945 was third largest on record, but 2 billion below the 1944 all-time record. Beef production was about 1 billion pounds larger than in the previous year, but the output of pork dropped around 3 billion pounds because of reduced pig crops in 1944 and the spring of 1945. During the year 1945 the Government procured about 5-1/2 billion pounds of meat, dressed-meat basis, for the armed forces and for export. Military procurement was greatly reduced in the latter part of the year at the same time when slaughter increased seasonally. Most of the cutback went into civilian channels, so civilian meat supplies have been quite large during the winter. Meat production in 1946 is forecast at around 23 billion pounds. Military requirements probably will be about a billion pounds. Exports in 1946 may be somewhat above a billion pounds. Civilian supplies of meat per capita in 1946 are indicated at about 150 pounds, with the increases occurring in beef and pork supplies.

Supplies of fresh and frozen fish this year are slightly above the prewar average. The total catch was much higher in 1945 than in previous war years, and the prospects for 1946 are also favorable. The pack of canned fish in 1945 was below average. Exports from the 1945-46 pack are estimated at 230 million pounds, and the armed forces took around 60 million pounds.

Total egg production in the United States in 1945 was somewhat over 5 billion dozen, 5 percent below the 1944 record but higher than any previous year. Net military procurement during 1945 appears to have totaled about 500 million dozen, and about 35 million pounds of dried whole eggs (105 million dozen shell-egg equivalent) were purchased for export. Egg consumption by civilians in 1945 reached a new record of 390 eggs per capita, compared with the prewar average of 298 eggs per person per year. Egg production is expected to continue high in 1946, but somewhat below 1945. Military needs have been greatly reduced. Nevertheless, per capita civilian consumption may be less than the record consumption rate in 1945, principally because of increased meat supplies. Supplies of eggs are expected to be particularly abundant during the next few months, which include the flush production season. It is possible that about 300 to 400 million dozen eggs may be available for export this year.

Milk production set a new record in 1945 of 123 billion pounds, 4 percent above 1944 and almost 20 percent above prewar. About one-sixth of the total supply of milk was used by the armed services and for export. The output of manufactured dairy products, particularly desirable for wartime purposes (Cheddar cheese, canned and dried whole milk), was at or near record rates. After the end of hostilities and the lifting of wartime restrictions on production and consumption of dairy products, wide shifts occurred in utilization of milk. Fluid milk and cream

marketings and ice-cream production increased, and butter production dropped off sharply. Civilian supplies of fluid milk and whole milk products were at or near record levels. Milk production in 1946 is expected to be 2 to 4 percent below 1945. However, the two-thirds reduction in noncivilian takings will leave about as much milk available per civilian as in the prewar period 1935-39. Whole milk products will be relatively abundant, but butter supplies are expected to continue quite short throughout the year.

Total domestic production of butter, lard, and other edible fat and oil products in the United States in 1945 is estimated at 6.7 billion pounds, about 10 percent smaller than in 1944, although above prewar levels. The decline was due mainly to a substantial reduction in lard output. Imports were about the same as in 1944 but amounted to only about one-third of prewar quantities. Substantial quantities of fats, mostly lard, were in storage at the beginning of the year but by the end of 1945 stocks were smaller than prewar. The armed forces procured over 700 million pounds of food fats and oils, including about 70 million pounds of lard, for civilian relief in Europe. Their purchases were sharply reduced immediately after the end of the war. Government procurement of fats and oils for export totaled about 400 million pounds, and another 250 to 300 million pounds were shipped out of stocks held at the beginning of the year. Civilian supplies of food fats and oils in 1945 were at the lowest point in over 20 years.

Production of food fats and oils in 1946 probably will increase somewhat, mainly because of a larger lard output. However, stocks of lard on hand at the beginning of 1946 were substantially smaller than a year earlier, so production and stocks together this year may be about the same as for 1945. We may export about as much lard in 1946 as last year when nearly 600 million pounds were shipped. Butter production may be no larger than in 1945. No increase in imports of fats is likely. Civilian supplies of food fats will be somewhat larger than last year's low, largely as a result of the increase in lard output and the reduction in military procurement of fats.

Fresh fruit and vegetable supplies were relatively high in 1945. Fresh-fruit consumption averaged about 145 pounds per capita compared with 139 pounds prewar, despite a substantial reduction in the apple crop. Fresh-vegetable supplies were very large because of high yields. The packs of canned fruits and canned vegetables in 1944 were quite large, but military procurement took over half of the year's supplies of canned fruits and about one-third of the canned-vegetable supply. The 1945 pack of commercially canned fruit was about 10 percent smaller than in preceding years, but military takings have been drastically reduced. Civilian supplies of canned fruit per capita this season may be about as large as the 15-pound average for the 1935-39 period. Canned vegetables from the 1945 pack are generally plentiful, and consumption is expected to set a new record.

The 1945 crop of potatoes was the third largest on record. Military requirements are much smaller than in the past few years. Internal transportation difficulties are hindering somewhat the distribution of the abundant supplies, but consumption is expected to equal the prewar rate of 130 pounds per capita. According to present indications, about 20 million bushels of potatoes will be exported during the 1945-46 crop year. The 1945 crop of sweetpotatoes was only about average. Noncivilian takings this year will be relatively small. The 1945 crop of dry beans was about 18 percent smaller than the previous year's crop. About 100 million pounds (cleaned basis) are being exported this year. The dry-pea crop in 1945 was about 40 percent smaller than the 1944 crop, but substantial quantities have been available for export again this year.

The 1945 wheat crop set a new record of 1,123 million bushels. Exports of wheat and flour, including military relief feeding, were very high in the July-December period. January 1 stocks of about 690 million bushels were 150 million smaller than on January 1, 1945. These supplies are sufficient to fill domestic food needs with recent extraction rates. Exports may reach 225 million bushels before the 1946 crop is harvested. However, much of the supplies are still on farms or at country shipping points. The movement of large quantities of wheat to mills and ports is particularly difficult, because of the limitations of transportation and port loading facilities. According to present indications, the United States may export about 375 million bushels during the 1945-46 crop year. The 1945 rice crop set a new record. Supplies for domestic consumption are being kept at a minimum so that large quantities may be procured for export.

The United States sugar supply situation has been very tight throughout 1945, and little improvement is expected in 1946. Stocks of sugar were sharply reduced in 1944 and offshore receipts in the calendar year 1945 were no larger than the prewar average 1935-39. At the same time, domestic sugar production was 18 percent smaller than prewar. The armed forces took about 2,100,000 short tons (raw value) for troop use and civilian relief feeding, and about 170,000 tons were exported, mostly to liberated areas. This left the smallest civilian supply, on a per capita basis, in four decades, 73 pounds per person. Domestic production is expected to increase somewhat in 1946, but the amount of sugar available from offshore areas has not yet been determined.

LATIN AMERICA

More favorable weather conditions in most areas of Central and South America indicate that both crop and livestock production should be materially larger in 1946 than in the preceding year. The food situation in the first half of 1945 was dominated by a serious drought which was broken in most regions in the third quarter. Plantings of crops in Argentina during the latter months of 1945 were delayed by a recurrence of dry weather, however, and some parts of Mexico were still dry.

In general there has been an upward trend in Latin American food production since prewar years (1936-40), even though 1945 crops were cut by drought. Wheat production in 1945-46 will be about 25 percent lower than prewar, while corn will be down about ten percent. On the other hand, Latin American rice production has increased by nearly a half over prewar, and sugar production by about a third, as may be seen in the accompanying table.

Latin America.- Summary of production, international trade, and apparent disappearance of important food products, prewar and 1945-46.

Commodity	Prewar Years 1/ Production	Prewar Years 1/ Apparent domestic Disappearance	Net imports 2/	Net exports 2/	1945-46 Prospective production	1946 Probable exports
	Amounts in principal producing countries (Thousands of short tons)					
Wheat 3/	8,404	6,229	-	3,619	6,181	3,300
Corn 4/	17,030	11,421	-	5,610	15,133	3,355
Rice 3/	1,235	1,427	299	-	1,833	197
Sugar 3/	6,166	2,318	-	3,727	7,996	5,156
Cacao 5/	218	23	-	196	183	166
Bananas 6/	n.a.	n.a.	-	1,712	n.a.	1,238
Beef 3/	3,574	2,762	-	753	n.a.	528

1/ Generally 1936-40, except that 1935-39 was used for Mexico.
2/ Exports from or imports into countries named.
3/ Countries included were Cuba, Mexico, Argentina, Brazil, Chile, Colombia, and Peru.
4/ Countries included were Cuba, Mexico, Argentina, Brazil, Chile, and Colombia.
5/ Countries included were Cuba, Mexico, Brazil, Colombia, Dominican Republic, Ecuador, and Venezuela.
6/ Countries included were Cuba, Mexico, Brazil, Costa Rica, Guatemala, Honduras, Panama, and Colombia.
n.a. = not available.

Population in Latin America has continued to grow, and in addition to this, virtually all countries in that region have been enjoying a wartime boom. These factors have led to a material increase in demand, so that the general trend in exports has not risen as rapidly as that in production. Further, there were certain shifts in the production pattern. In Argentina, part of the corn crop that could not be exported, was used to increase pork and lard production. In several countries, efforts were made to stimulate production of oilseeds to replace the loss of supplies of fats and oils from the United States and the Far East. Rice production expanded throughout the area, so that some countries, such as Chile and the Dominican Republic, have changed from an importing to an exporting basis.

Exports of sugar and bananas from the area including Mexico, Central America, and the Caribbean will be larger in 1946 than in 1945. The 4,400,000 short tons of sugar available from the Cuban crop is not only higher than last year but much above average prewar exports, which were under 3,000,000 tons. An additional 2,000,000 tons will be available from the rest of the Caribbean, but small imports will be needed in Central America and a substantial quantity by Mexico. A few of the Central American countries will be short of sugar in the first half of the year. In Mexico, below-average rainfall continued throughout 1945, and the crops harvested in late 1945 were generally poor. Imports of wheat, corn, sugar, and fats will be needed in 1946.

Throughout the whole of Central America and the Caribbean area, wheat flour, fats and oils, and rice must be imported. Banana exports from this region will amount to about 50,000,000 stems in 1946. This will be higher than during any year of the war period, but will not reach the prewar total. About 6,000,000 stems of bananas will also be exported from Brazil, 2,000,000 from Colombia, and 1,200,000 from Ecuador.

Argentina, the principal surplus food-producing country in South America, will have larger food exports in 1946 than in the preceding year, except for pork and lard. Although 1945-46 harvests are not much improved over 1944-45, better shipping facilities and less use of grains for fuel will provide more for export. Estimated quantities for 1946 export in short tons are: corn, 3,400,000; wheat, 3,300,000; meats, 775,000; and substantial quantities of lard, vegetable oils, and dairy products.

Both Uruguay and Paraguay will have surpluses of meat during 1946, Uruguay somewhat less than 110,000 short tons (carcass-weight basis), and Paraguay about 18,000 short tons of canned meat. Brazil's estimated export of 28,000 short tons of meat is less than a year ago and much below peak exports of 1942. Brazil's anticipated rice exports this year of 140,000 short tons and Ecuador's of 50,000 continue the upward trend of exports from these countries during recent years. Brazil and Chile will have export surpluses of beans. Peru and Brazil will produce an exportable supply of about 325,000 short tons of sugar in 1946. In addition, there may be small exports of other products from South America, mostly within the Continent.

With the exception of Argentina, all the countries of South America must import varying quantities of food products. All but Argentina and Chile import a large proportion of their wheat and flour requirements, and the northern and northwestern countries import substantial quantities of fats and oils, and smaller quantities of dairy products. Part of the surplus from Argentina goes to supply these deficit areas, but the United States usually furnishes the major part of these requirements for all except Brazil, Bolivia, and Paraguay.

Mexico

Summary.

As a result of increased demand and low 1945 production of some of the country's important food and feed crops, food supplies in Mexico during 1945 were substantially below requirements, and present prospects indicate greater shortages in the first half of 1946. Shortages in 1945 were most pronounced in fats and oils. Partly as a result of inadequate transportation and some withholding of products in anticipation of higher prices, supplies of meats, grains, sugar, vegetables, and fruits at wholesale and retail outlets were generally short, and prices rose steadily. With the exception of chickpeas and certain fruits, 1946 supplies of food items for export will be below 1945 shipments. The most significant food exports will be chickpeas, tomatoes, and bananas. The quantity of corn, wheat, fats and oils, sugar, and milk products which would be imported if readily available, would probably be at record or near-record levels in 1946. Present conditions in the country's transportation system will make it difficult to obtain sufficient imports and will also act to curtail exports, particularly of fresh fruits and vegetables.

Background.

Mexico usually supplies most of its own food needs, although it does import fats and oils, varying amounts of wheat, and small quantities of milk products and dried fruits. It usually has export surpluses of a relatively large number of live cattle, fresh vegetables, bananas, coffee, and in some years rice and beans. Ordinarily very little trade is carried on in meats, with the exception of a few imports of cured pork. Feeder cattle, however, are exported to the United States, although the total so exported has declined in recent years. Most of the food trade is with the United States. Local food shortages are common, because of poor distribution from one region to another.

Corn is by far the most important item in the diet, followed by beans. Food production increased during the war, particularly in oilseeds, sugar, truck crops, and cereals. A 10-percent larger population than in prewar and greater purchasing power, however, increased consumption requirements to offset the larger total production.

Prolonged drought in 1943 led to critical crop shortages in corn and beans, and increased food imports were necessary. The situation was improved in 1944, but below-average rainfall in 1945 again led to severe shortages. Wheat, sugar, and lard have been imported in quantity, and there have been shortages in meats, dairy products, and even corn.

Present situation.

Rainfall of approximately 50 percent below normal through most of the central and west-coast districts in 1945 caused further deterioration in late crops. Below-average yields per acre are estimated for the 1945 crops of corn, beans, garbanzos, and most other crops harvested in the summer and fall months.

Both the 1944-45 wheat crop and the corn crop harvested in the fall of 1945 were below the harvests of the preceding year. Supplies of corn were tight during the last few months of 1945, and with the current small crop, imports will be required in 1946. Plans are under way to insure that the 1946 corn acreage will exceed the large 1944 area of about 8,600,000 acres. The 1944-45 wheat crop of 410,000 short tons fell far below domestic requirements, and imports are being made. Increased plantings for the 1945-46 crop were encouraged by higher support prices for the 1944-45 harvest, but the new crop is estimated at only 420,000 short tons. The rice crop harvested in late 1945 was larger than for the preceding year and is expected to approximately equal domestic needs in 1946.

The over-all 1945 production of oilseeds is estimated to be somewhat below 1944 production, which did not provide for the country's requirements of fats and oils, and estimated 1946 production shows a further slight decrease. About 35,000 short tons of lard were imported in 1945. The United States, the usual supplier, has not been able to furnish lard, and most of the 1945 imports were purchased in Argentina. Should it be possible, contrary to present indications, for Mexico to import copra in 1946, there might be a shift in the country's imports from lard to copra.

Bananas are the principal fruit exported, although there is some export of pineapples and limes. Most other fruits are grown for domestic use only. Exports of bananas are expected to reach 5,000,000 50-pound stems in 1946, compared with annual shipments of about 13,500,000 stems in prewar.

The current crop of beans, harvested principally in the latter months of 1945, is estimated at only 160,000 short tons, which will provide no export surplus unless prospects indicate a large production of beans during 1946-47. The current harvest of chickpeas is expected to provide an export surplus of 55,000 short tons during 1946. Present prices and demand for chickpeas indicate some increase in the 1946 crop.

Growing conditions in all sugar-producing districts were generally satisfactory in the fall of 1945. Practically the entire production is on irrigated land, and the dry weather during the past several months has not

materially affected the cane crop. Estimated 1945-46 production of raw sugar is 565,000 short tons compared with 438,000 tons in 1944-45. Supplies have been short, however, and imports of more than 100,000 tons were made in 1945.

Scarcities occurred in Mexico in both meat and dairy products in 1945 and are expected to continue into 1946. Shortages are particularly acute in the city markets. Beef is the principal meat consumed, making up two-thirds of the total estimated 1946 production of 348,000 short tons. Imports of powdered, evaporated, and condensed milk will continue to be needed in the new year.

Production of vegetables for the export market has increased in recent years. A severe frost struck the growing areas in mid-January 1946, however, and the quantities available in the 1945-46 export season are expected to be about 2,000 carloads less than in the preceding year, when 9,156 carloads were shipped. Tomatoes are the principal winter vegetable export. The shipping situation is extremely tight and actual exports of all fresh winter vegetables may be curtailed for that reason.

Mexico.- Production, trade, and apparent disappearance of important food products in 1935-39, and estimated production and exports, 1945-46.

Commodity	Production		Apparent domestic disappearance	Prewar, Net imports	International trade 1/	
	Prewar 1935-39	Prewar 1945-46	Prewar 1935-39		1935-39 Net exports	1946 Prospective net exports
	1,000 short tons	1,000 short tons	1,000 short tons	1,000 short tons	1,000 short tons	1,000 short tons
Corn	1,891	2/2,300	1,890	-	1	3/
Wheat	428	4/ 420	471	5/43	-	3/
Rice	59	2/ 90	46	-	13	0
Sugar (raw)	341	4/ 565	340	-	1	3/
Beans	129	6/ 160	159	-	1	7/8
Chickpeas	55	6/ 110	22	-	33	55
Tomatoes	75	2/ 273	49	-	26	103
Bananas	687	1/ 496	158	-	338	105
Beef and veal	249	1/ 233	249	0	0	3/
Lard	26	1/ 30	28	2	-	3/
Vegetable oils 8/	32	1/ 94	32	0	0	0

1/ Calendar year, 1946. 2/ Calendar year, 1945. 3/ Net imports are probable. 4/ Year ending June 1946. 5/ Includes flour in terms of grain. 6/ Year beginning April 1945. 7/ Low quality beans from the 1944-45 crop. 8/ Oils from domestic production only. Before the war copra was imported in quantity.

Central America

The 1946 food supply situation has improved somewhat in recent months and promises to be better than in 1945 when drought reduced production. The area will continue to need imports of wheat flour and fats and oils, however, throughout 1946. Banana exports of almost 40,000,000 stems are expected from Central America during the new year. This is about 15 percent above 1945 exports.

In Central America as a whole, the principal food exports are bananas, coffee, and cacao. While food in considerable quantity and variety is usually imported, the most serious deficits are in wheat flour and fats and oils. The area is usually practically self-sufficient in the staple food items, corn, beans, and sugar, slight deficits in some countries being met by small surpluses in others. Small quantities of rice move into the area from outside, mainly into Panama and Costa Rica. Small imports of meats and dairy products are largely for the city trade. Panama depends on outside food to a greater extent than the other countries, importing a wide variety of products from the United States. In general, the United States takes most of Central America's exports and supplies the major part of its food imports.

Although food product ion has increased during the war years, greater population and expanded wartime purchasing power increased the effective demand for food products. During the past 2 years, drought conditions reduced supplies, shortages of basic foods were acute, and imports of staple foods into the area were necessary.

Harvests in late 1945 were much improved, however, and will provide for domestic requirements of corn, beans, root crops, vegetables, and fruits. Small imports of sugar and rice will be necessary in early 1946, plus imports throughout the year of the usual deficit items, lard and wheat flour. In addition to bananas, the region will export cacao from Costa Rica and Panama.

Cuba

<u>Summary</u>.

In general, Cuban food supplies in 1946 are likely to be larger than during 1945. The principal food export in 1946 will be 4,400,000 short tons of sugar, but small exports of candy, fresh fruits, fresh vegetables, canned pineapple, and preserves are also likely. The quantities available for export of all these items, with the possible exception of fresh vegetables, should be well above average. The demand for imports will also be high because of the increased purchasing power resulting from sugar and tobacco prosperity, and the need to restore exhausted stocks. Food supplies will be tight during the first quarter of 1946. The most important import items for the year will be rice, wheat flour, lard, edible oil, beans and peas, and soap fats, with minor requirements for

cured pork, malt, wheat, onions and garlic. Other items needed to supplement deficient domestic supplies are corn, canned milk, and eggs.

Background.

Of the usual food export products, sugar is by far the most important, followed by coffee, winter vegetables, and fruit. Corn, beef, and canned milk have been exported during some years but are not usually on an export basis. Before the war the United States took about three-quarters of Cuba's total export, followed by the United Kingdom with about 15 percent of the total. Corn, root crops, meat, and dairy and poultry products are grown and consumed domestically and usually do not enter into foreign trade. These are supplemented by imports of such items as rice, lard, wheat flour, cured pork, onions, garlic, and malt. Cuba imports all of its wheat and flour, about 90 percent of its rice, and most of the lard. The United States was the source of most of these imports, although before the war part of the rice was received from the Far East. During the war, the United States has become even more important in both import and export trade.

The worst drought in 86 years drastically reduced agricultural production in 1945. Raw-sugar production of 3,923,000 short tons was almost 20 percent below the preceding crop. Foodstuffs production was cut sharply, increasing the demand for imports. Pastures dried up, and many cattle died of starvation. This unfavorable food situation was further accentuated by difficulties of obtaining imported food under war conditions.

Present situation and outlook.

The acute shortages of many products, which continued until October 1945, coupled with high prices, provided an incentive to plant more food crops. Weather conditions during the last half of 1945 were favorable, and production in the late fall was good. Present high prices should stimulate increased plantings during 1946, and relaxation of wartime restrictions on trade should permit Cuba to obtain many needed supplies from outside. It is probable, however, that she may not be able to obtain sufficient rice, lard, and other edible and inedible fats and oils to avoid scarcities and increased prices of these items. Because of prospects for a good sugar crop, which will sell at a price nearly 20 percent above that for the 1945 crop, demand for food products will be high. If supplies were available, Cuba could consume during 1946 almost twice the volume of some products that it did in 1938 or 1939.

The quantity of raw sugar available for export in 1946 probably will be the largest since 1930. Although the crop is estimated at about 16 percent below the record 1944 crop, the quantity of raw sugar that will be made will probably be slightly larger. Much of the increased domestic consumption in 1946 will be used in the manufacture of candies and other sugar products for export.

Cuba.- Production, apparent domestic disappearance and trade of important food products in 1936-40, and prospective production and exports, 1946.

Commodity	Production		Apparent domestic disappearance	International Trade		
				Prewar 1936-40		Prospective
	Prewar 1936-40	Estimated 1946	Prewar 1936-40	Net imports	Net exports	1946 net Exports
	1,000 short tons	1,000 short tons	1,000 short tons	1,000 short tons	1,000 short tons	1,000 short tons
Wheat & flour in terms of grain	0	0	144	144	-	1/
Rice, clean	13	30	235	222	-	1/
Corn	170	165	166	-	4	1/
Sugar, raw	3,183	4,750	200	-	2/2,848	4,400
Potatoes, white	55	90	87	32	-	1/
Other root crops	530	575	530	-	-	1
Plantains	300	330	399	-	1	5
Beans and peas	48	48	75	27	-	1/
Bananas	n.a.	n.a.	n.a.	-	126	38
Pineapple	81	105	16	-	65	87
Grapefruit	15	12	9	-	6	2
Fresh vegetables	n.a.	n.a.	n.a.	-	38	20
Beef	135	125	134	-	1	1/
Cured pork	19	18	22	3	-	1/
Lard	5	3	28	23	-	1/
Edible oils	3	5	8	5	-	1/
Milk, canned	18	13	20	2	-	1/

1/ Net imports probable.
2/ Difference between production and domestic disappearance and exports was accounted for by an increase in carry-over.
n.a. = not available.

A variety of fruit is produced but the only ones of export sifnificance are bananas, pineapples, and grapefruit. Production of the last two will be higher in 1946 than the preceding year. Exports of pineapples will exceed both last year and the prewar average, whereas exports of grapefruit will fall behind the prewar average. Bananas will continue to be produced for home consumption, but exports will be small.

Exports of fresh vegetables consist of the so-called winter vegetables, principally tomatoes, followed by cucumbers, eggplant, green peppers, okra, and lima beans. Exports during the winter of 1945-46 will be three

times those of the preceding year, and it is anticipated that production and exports should increase to near prewar levels during the winter of 1946-47.

Grain and its products are the principal food imports into Cuba, rice and wheat flour being the most impertant. The 1946 imports of flour are expected to be less than during 1945. The short corn crop in 1945 did not supply requirements. The deficit which will continue through part of 1946, makes imports necessary during the first three-quarters of the year.

The potential demand for all edible fats and oils in 1946 is estimated at 60,000 short tons. Cuba must import most of these products and has been unable to obtain full requirements during the war. In addition to lard and edible oils, Cuba must also import soap fats.

Production of root crops in late 1945 and early 1946 is likely to be above average. With the exception of potatoes, these do not enter trade. Part of the estimated potato imports will be used for seed.

With the current large demand for livestock products and the difficulty of obtaining feed, sizeable quantities of beef, cured pork, poultry, eggs, and dairy products probably would be imported if available. Other items that will need to be imported in 1946 include beans, peas, onions, and garlic.

Other Caribbean

The outlook for 1946 in Haiti, the Dominican Republic, the British and French possessions and Puerto Rico, all within the Caribbean region, includes an estimated export of 2,000,000 short tons of sugar and 4,000,000 stems of bananas. Although there is a wide variety of imports into the area, the principal items will be wheat flour, rice, fish and beans.

Usually Haiti and the Dominican Republic produce enough of the staple crops, with the exception of wheat flour, fats and oils, and fish, to supply their own needs and export to neighboring islands small quantities of corn, beans, rice, vegetables, and fruit. The Dominican Republic also sends some frozen beef to Puerto Rico and yuca starch to the United States. The demand for wheat flour in these two countries has doubled in the past few years.

Drought hit the whole Caribbean severely in early 1945 and sharply reduced production of food crops. Harvests in late 1945 were much improved, and good crops are expected in early 1946. The early 1946 corn crop in the Dominican Republic, however, may be reduced because of increased plantings of tobacco.

Sugar exports from the Dominican Republic are scheduled to go to the United Kingdom and banana exports from Jamaica to that market were expected to be resumed in mid-January. Otherwise, most of the exports from this area will go to the United States.

Argentina

Summary.

Wheat production in 1945-46 will be about the same as the short crop of 1944-45, but 32 percent below prewar. Corn production may be about 70 percent above a year earlier but still only about two-thirds as great as prewar. Exports of wheat in 1946, however, probably will be below the prewar 5-year average by about 600,000 short tons but above exports last year. Corn exports will be below prewar by about 40 percent. Flaxseed exports in 1946 likely will be greater than in 1945 but much below prewar because of the short crop. Sunflowerseed production has increased tremendously. Probably 80,000 short tons of sunflower oil will be exported in 1946, whereas none was exported prior to 1941.

Beef production declined considerably during the first 6 months of 1945 because of drought conditions and packinghouse strikes. The quantity available for export in the calendar year 1946 will in all probability amount to 500,000 short tons, which is 23 percent below the prewar average. Meat production tended to increase sharply during the war, and peak production of beef and pork was reached in 1944 and 1945, respectively. Production of pork and lard expanded severalfold, but heavy liquidation of hogs in late 1945 will reduce the 1946 output by 40 to 50 percent. Lamb and mutton exports in 1946 will be about 3 times as great as in the 5-year period just prior to the war.

Background.

The population of Argentina is comparatively small, its agricultural production great. Consequently, it produces some of the world's largest exportable surpluses of wheat, corn, beef, flaxseed, wool, mutton, and sunflowerseed oil. Its export trade is now returning to something like the pattern that existed before the war, but with certain important and probable permanent shifts. Grain is tending to predominate the foreign trade as previously.

World War II appreciably affected production and marketing of food crops through the shortage of shipping and the Allied blockade of the Continent. Loss of the European market was compensated in part by expanded trade with neutrals and Allied nations. Argentine wool, vegetable oils, cheese, and casein were consumed chiefly by the United States; meat by the United Kingdom; and Brazil continued to take about the usual quantities of wheat. Despite a decline in volume of exports, Argentine trade increased in value during the war years because of (1) higher prices; (2) a shift in the composition of exports toward relatively more products with higher value per ton, such as meats (especially boned meat), dairy products, dehydrated eggs, and vegetable oils: and away from wheat, corn, and oilseeds.

Surplus grain was accumulated during the war because corn and wheat acreage declined less than exports. Part of the surplus corn was burned as a source of power and heat when coal and petroleum could not be imported. Wheat, however, did not serve well as fuel, and large quantities of it deteriorated in storage. The Argentine Government supported grain prices and regulated the grain trade in an effort to offset the decreased market outlets. Rice production, in contrast to wheat and corn, increased during recent years, and Argentina now is approximately self-sufficient in this cereal. Another crop which expanded greatly during the war was sunflowerseed. This expansion was accompanied by a rapid expansion of the crushing industry. By the war's end, Argentina had shifted to an export balance of trade in edible vegetable oils. Meantime, Argentina continues in the position it has occupied for a number of years as the world's leading producer and exporter of flaxseed.

Unlike grains, exports of animal products were maintained, and in some instances expanded during the war. The United Kingdom absorbed large quantities of Argentine frozen boned pork, while the United States purchased considerable canned meat for its Armed Forces. From 1940 to 1944, pork production expanded to nearly four times that of prewar years, thus increasing domestic demand for corn. In late 1945, however, feed shortages resulting from drought caused a liquidation of hogs.

In 1945, Argentine over-all food production was estimated at 96 percent of the 1935-39 average and was below that of the early war years. Reduced production resulted primarily from the severe drought that adversely affected crops and pastures throughout a large part of the Southern Hemisphere from May 1944 until July 1945. The 1944-45 corn crop, estimated at 3,269,000 short tons, was only one-third as large as the preceding crop and 60 percent smaller than the prewar average. The 1944-45 wheat crop of 4,500,000 short tons was smaller than average and 40 percent less than the preceding crop.

Present situation and outlook.

The Argentine over-all production of foods and feedstuffs in 1946 is not expected to be significantly higher than in 1945. This is the result of adverse weather upon western and some central pastures, interference of drought conditions with planting, and adjustments of minimum purchase prices by the Government, which came too late to encourage maximum acreage of some early crops, notably wheat.

With increased availability of ocean shipping and resumption of fuel imports, so that it is no longer necessary to burn agricultural products, possibilities are considerably better now than in 1945 for moving much, if not most, of available supplies into export channels. If inflation continues as expected, stocks may remain high, nevertheless, because of speculation tendencies.

Production of wheat in 1945-46 is tentatively estimated at 4,500,000 short tons, compared with 4,500,000 tons in 1945 and 6,653,000 tons prewar.

Exports of wheat and its equivalent in flour could reach 3,300,000 short tons in calendar year 1946 if transportation were adequate and there were no spoilage nor carryover at year-end. On the basis of past performance, usual spoilage, and present state of disrepair of transportation facilities, an export total of 3,000,000 short tons is regarded as more probable.

The first official estimate places the 1945-46 Argentine corn acreage at 9,789,000 acres. The weather, however, was hot and dry during November and the first two weeks of December, which necessitated some replanting and the use of late varieties. Some locust damage has been experienced also. Field observations indicate that the harvest from the 1945-46 corn crop will not exceed 5,500,000 short tons. At that level, 1946 production would be appreciably greater than the 1945 harvest of about 3,300,000 short tons, but considerably below the 5-year prewar average annual corn production of 8,456,000 short tons. Since corn will not be burned as fuel to any great extent in 1946, exports should be nearer normal than at any time since the early war years.

The 1946 probable exportable surplus of oats is about 400,000 to 500,000 short tons; barley, 600,000 to 700,000 short tons; and rye, 250,000 short tons.

Flaxseed production in 1946 will be about 33 percent greater than in 1945. An exportable surplus either in seed or seed equivalent of about 1,050,000 short tons, a quantity about 27 percent under prewar exports, is expected, provided neither transportation nor speculation hinder movement. Linseed cake and meal exports in 1946 may total 400,000 short tons. The sunflowerseed crop is expected to yield a tonnage equivalent to that of 1944-45, netting an exportable surplus of 20,000 and 80,000 short tons of seed and oil, respectively.

An increase is expected in 1946 (calendar year) beef exports, due in part to the tendency to market at heavier weights since the removal of price differentials unfavorable to heavy carcasses in June 1945. The most important factors which will influence total volume of cattle sold in 1946 as usual will be weather conditions and grain prices. The latter will determine whether grain crops will be harvested or used as straight pasturage.

As a result of heavy liquidation of hogs following the short 1945 corn harvest and narrowing hog-feed ratios after mid-year 1945, production in 1946 is expected to decline 40 to 50 percent. In 1946, pork exports probably will not exceed 110,000 short tons, carcass-equivalent basis, and lard 40,000 short tons.

Lamb and mutton production probably will be the same or slightly less than in 1945, with the exportable supply approximating 165,000 short tons, carcass-weight equivalent. The recent improvement in the wool export situation may induce a slight uptrend in breeding for lambing during the second half of 1946, but such increase would influence marketings chiefly in 1947.

Exports of butter and cheese in 1946 probably will not exceed 15,000 and 11,000 short tons, respectively.

Argentina.- Production and trade and apparent disappearance of food products in 1936-40, and estimated production and exports, 1946.

Commodity	Estimated production 1936-40	Estimated production 1945-46 1/	Apparent domestic disappearance 1936-40	International trade 1936-40 Net exports	International trade Prospective 1946 Net exports
	1,000 short tons	1,000 short tons	1,000 short tons	1,000 short tons	1,000 short tons
Wheat	6,653	4,500	3,034	2/ 3,619	2/ 3,000
Oats	802	880	462	340	400-500
Barley	542	1,100	242	300	600-700
Rye	273	365	142	131	250
Corn	8,456	5,500	2,905	5,551	3,300
Sugar	514	500	496	18	8/
Beef and veal 3/	4/ 1,919	1,600	1,270	649	500
Lamb and mutton 3/	4/ 188	300	134	54	165
Pork 3/	5/ 121	n.a.	100	21	110
Flaxseed	1,667	1,400	237	6/ 1,430	1,400
Sunflower seed	239	1,100	229	10	20
Sunflower seed oil	50	n.a.	50	7/	80
Lard	n.a.	n.a.	n.a.	8	40

1/ Preliminary estimates: Crop year 1945-46 for crops, but calendar year 1946 for livestock products.
2/ Including exports of flour in wheat equivalent.
3/ Dressed weight (bone-in) basis, 1934-38 average, not 1936-40.
4/ Including farm production.
5/ Excluding farm slaughter.
6/ Exclusive of average exports of 1,538 short tons of linseed oil.
7/ No sunflower seed oil exported before 1941.
8/ Probable net imports.
n.a. = Not available.

Brazil

Summary

The present condition of Brazil's crops to be harvested in the first six months of 1946 is extremely favorable. Moreover, the government decree in effect providing minimum prices for rice, beans, corn, peanuts, soybeans, and sunflower seed, together with the relatively high prices now existing, have caused farmers to make a substantial increase in their cereal plantings for harvest in 1946. This increase has been achieved partly by decreasing plantings of cotton. The prevailing opinion is that the country is entering 1946 with a better general food position than has been prevalent in several years.

Prewar and Wartime Situation

Brazil as a nation is practically self-sufficient in foods excepting for wheat. The import of this grain together with wheat flour continues to be one of the basic elements in the foreign-trade picture of the country. The chief agricultural export is coffee, and Brazil is the world's largest supplier. Other exports, which form much smaller percentages of the total, include meat and products, sugar, fruits, corn, rice, manioc, beans, cacao, and cottonseed oil. From 1932 to 1939 Brazil exported relatively little meat. With the outbreak of hostilities in Europe, however, meat and byproducts assumed third place in the country's exports. Following the peak year of 1942, available supplies of meat for export again declined, at first because of increased domestic consumption and later because of the 1944-45 drought. During the war many European markets were cut off, but most available exportable supplies of such crops as beans, rice, and other foodstuffs are now being purchased by UNRRA and Great Britain. Brazil's internal transportation problems make it difficult to distribute products to consuming centers or to ports for export.

Imports of food into Brazil are small with the exception of wheat and wheat flour. About 10 to 15 percent of its annual wheat requirements are produced locally, and approximately 1,100,000 short tons are imported. The traditional supplier of the country's imports is Argentina, although there recently has been an upward trend in imports of United States flour. The Brazilian Government has lately become active in trying to increase domestic wheat production in an attempt to find a satisfactory long-range solution to the local wheat problem.

The drought, which prevailed in central and southern Brazil during 1944 and extended into 1945, followed at times by near-flood conditions, reduced production of most of the principal foodstuffs except rice, and limited livestock production. There was little evidence of a shortage of food in the country, but with transportation difficulties its distribution continued to be a major problem. Exports of foodstuffs were made under close supervision.

Present Situation and Outlook

The present outlook for Brazil's crops is much more favorable than at this time last year when extensive drought conditions prevailed. The acreages planted to cereals also have been expanded probably, at least in part, in response to the favorable price situation of these products.

Acreages devoted to corn are greater than for any other single commodity. Much of the increase, however, is in areas too far in the interior for the crop to move to markets with present transportation facilities. Normally the greater part of the corn crop, perhaps 80 or 90 percent, is used as feed for livestock, especially hogs, and the remainder is used for human consumption and exports.

Brazil: Production, trade, and apparent disappearance, of important food products in 1936-40, and estimated production and exports, 1946-46

Commodity	Estimated production 1936-40	Estimated production 1945-46	Apparent domestic disappearance 1936-40	International Trade 1/ 1936-40 Net Imports	International Trade 1/ 1936-40 Net Exports 2/	International Trade 1/ Prospective 1946 Net Exports
	1,000 Short tons	1,000 Short tons	1,000 Short tons	1,000 Short tons	1,000 Short tons	1,000 Short tons
Wheat	140	209	1,233	3/ 1,095	-	4/
Corn	6,015	6,548	5,961	-	54	55
Rice, milled	972	5/ 1,360	930	-	42	143
Sugar	6/ 1,155	6/ 1,323	1,108	-	47	50
Manioc	6,860	n.a.	6,860	-	8/	n.a.
Beans	897	1,121	895	-	2	101
Oranges	1,357	700	1,202	-	155	52
Bananas	1,183	1,200	1,015	-	168	150
Cocoa beans	7/ 131	112	9/	-	131	112
Beef & veal 9/	10/ 910	11/ 660	808	-	103	12/ 28
Pork 9/	10/ 244	11/ 250	240	-	3	0
Cottonseed oil	78	13/ 97	51	-	28	15

1/ Trade figures for calendar years.
2/ In some instances where imports or exports are minor, the figure is gross.
3/ Includes flour in terms of grain.
4/ Net imports probable.
5/ 1944-45.
6/ Crop years June to May, 1935-36, 1939-40 and 1945-46.
7/ Quantity exported has been taken as quantity produced.
8/ Negligible.
9/ Dressed-weight basis, bone-in, exclusive of farm slaughter.
10/ 1934-1938 average.
11/ For 1946, calendar year.
12/ About 60 percent stewed steak and the rest corned beef.
13/ Calculated production - 1944.

Production of wheat has continued at a reasonable level, but consumption has been steadily growing over a period of years, due mainly to the developing preference for wheat bread, removal of a regulation requiring the mixing of manioc flour with wheat flour, and an increase in the country's population. Present supplies of wheat in Brazil are very short, considerably curtailing local flour production. To relieve the situation, flour and wheat are being imported from the United States and Canada.

Surpluses of rice for export usually depend upon ability of central Brazil to fill most of its own consumer needs without drawing upon supplies in other parts of the country. Present indications are that 1946 supplies in central Brazil are more than ample.

During the year, better pasture conditions may increase the slaughter weight of livestock, but total slaughter for 1946 is expected to decrease. Inspected cattle slaughter will not exceed 3,750,000 head, the smallest number since 1933. Exports of meat in 1946 will probably be near 28,000 short tons. General indications are that the 1945-46 sugar crop will be approximately the same as for the previous season, or about 1,300,000 short tons. Exports of sugar nearing 50,000 short tons may be available during the year 1946. There now are plans to continue rationing sugar and meat for a while, because of short supplies.

The citrus industry is in very poor condition at present, partly because of disease in some areas, but with the opening of European markets, new interest is being shown in the groves. Government export restrictions during the war increased the quantities of fruit rejected as culls. The freeing of the export markets so that larger quantities of fruit may be shipped should automatically reduce the high percentage rejected as culls and proportionately increase that boxed for foreign shipment.

Expectations are that the bean crop will be above 1,100,000 short tons and that a record percentage of the crop will be moved to terminal markets this year. Cacao exports are expected to be near 112,000 short tons.

The vegetable-oil situation is less favorable than last year because of the short cotton crop in 1944-45. The failure of last season's harvest and anxiety over the position of Brazil in the international cotton market is discouraging the plantings for the 1945-46 crop. The carry-over of oil from the 1944-45 crop was exceptionally low, and domestic consumption is continuing to increase. On the basis of prospects for the coming cotton crop, however, there may be about 10,000 to 20,000 short tons of oil available for export in 1946.

Venezuela

Food production is always short of consumption in Venezuela, and in 1946 relatively large imports are needed of wheat, wheat flour, rice, other cereals, potatoes, sugar, lard, vegetable oils and oilseeds, dried, conserved, and fresh fruits, pork, animal feeds, and dairy products including butter, cheese, condensed, and dried milk. There has, however, been some increase in Venezuelan food production since the outbreak of World War II.

The 1946 demand for practically all the products named, with the possible exception of rice and potatoes, will exceed that of the war years, during which time war shipping and procurement difficulties kept imports to a minimum. Very large increases in imports of some items may be expected if Government policy succeeds in raising purchasing power of the low-income group. This does not reflect decreased Venezuelan production but rather resumption of pre-war imports. There has been an increase in the production of rice, potatoes, and to a lesser extent, vegetable oils, but domestic production of these commodities is still insufficient to make the nation self-sustaining, although high prices prevail.

The Venezuelan Government is attempting to expand corn production in 1946 by extending assistance to growers. With normal weather, this campaign is expected to increase corn production to a level in excess of that consumed directly as human food.

Natural increase in population since 1940 provides at least a 10 percent increase in demand for food in 1946, and an anticipated increase in wage rates is expected to strengthen market demand still further.

Venezuela required approximately 11,000 short tons of imported sugar in 1945, the first year it failed to produce its requirements. Demand will probably be as great in 1946.

Exportable surpluses of cattle and cacao generally are produced. The Venezuelan Government, however, is attempting to prohibit exportation of beef cattle in 1946 as a means of alleviating what it considers a domestic beef shortage. Generally, about 20,000 head of cattle are exported to the Weat Indies and others to Colombia. Approximately 16,500 short tons of cacao will be available for export.

Colombia

Weather conditions and resulting crops in Colombia have been generally satisfactory in 1945, and at present, conditions seem favorable for 1946. During the war years, production of rice, sugar, and beef cattle increased more rapidly than population of the country. Higher consumer income led to stronger demand for wheat, sugar, fats, dairy products, and meats. This condition can be expected to continue into 1946.

The food production andconsumption in Colombia is typical of that of the greater part of tropical America. Exact amounts of production of some important products is not known. It may be said, however, that there is little dependence on imports. Exports are likewise small, except for a few crops such as coffee and bananas.

Colombia has a wide range of crop and livestock products because of the varied climatic conditions found at different altitudes. Most important food crops in the low-lying tropical areas are corn, plantains, manioc or yuca, and rice. In the higher areas principal crops are corn, potatoes, and wheat. At lower and intermediate elevations these crops are supplemented in the diet by various vegetables and fruits, especially oranges and papayas. About 1.3 million head of cattle are slaughtered each year for the use of the population of some 10 million persons. There are also some pork, dairy products, and poultry and eggs.

Since prewar years there have apparently been increases in the per capita production of rice, corn, potatoes, beef, sugar, and milk, while meat and cacao production have lagged behind population growth. Trends in the important manioc and plantain crops are not known.

Production of wheat for 1946, assuming normal weather conditions, should amount to around 90,000 short tons, and rice production is expected to be nearly as great. These amounts represent a decline of around 25 percent from 1935-39 for wheat and an increase of 75 percent for rice. It should be kept in mind, however, that the combined tonnage of wheat and rice produced in Colombia is only a third to a half as great as estimated tonnage of any one of the four chief crops: corn, potatoes, plantains, and manioc. With normal crop conditions, production of 82,000 tons of sugar is expected as compared to 46,000 tons in the prewar period. Production of cacao is about equal to prewar at 9,000 tons.

Annual imports of wheat in the prewar period averaged 25,000 short tons. But with increased buying power at present, considerably greater amounts would undoubtedly be imported in 1946 if available. Rice imports before the war averaged 14,000 tons, but present production is sufficient to meet domestic requirements. Prewar imports of sugar averaged 14,000 tons, but with stronger present demand, somewhat more would be imported if available in 1946.

Colombia is a fat-deficient country and in 1935-39 imported an average of 1,800 short tons of hog lard plus 9,000 tons of copra each year, the latter being for the manufacture of vegetable lard. Production of cottonseed and of sesame has been stimulated during the war, but demand for imports of fats is fully as great as in prewar years.

Ecuador

In 1946, Ecuador will have larger than usual exports of rice, cacao, and bananas. As usual, imports will be required of sugar, fats and oils, and grains.

Prospects for the 1946 rice harvest are favorable, as a result of increased prices, development of new rice lands, and increased mechanization. Exports of 51,000 short tons are predicted from the 1946 harvests, barring crop failures from lack of rain or from disease. In addition, 10,000 short tons remain on hand from the 1945 crop, exportation of which may be authorized by the Ecuadoran Government.

Exports of cacao in 1946 are expected to approximate the average of 1,400 short tons monthly in 1945. With the resumption of more adequate refrigerated steamship service early in 1946, Ecuadoran exports of bananas can be increased from the present level of approximately 500,000 stems to 1,200,000 stems annually, half of which will move north and half south.

The Ecuadoran Government is extending loans to sugar mills so that they may increase plantings, install additional machinery, expand irrigation facilities, and acquire additional agricultural implements. The 1946 crop, as a result, is expected to be greater than previous crops, and sugar import requirements should be less than the 8,000 to 10,000-short-ton requirement of recent years.

In 1946, Ecuador will require a small quantity of fats and oils and considerable wheat to maintain the current level of consumption.

Peru

Peru imports relatively large quantities of wheat, wheat flour, meats, fats, oils, fruits, and small quantities of eggs and dairy products. Peru's chief export food is sugar, and it is the only South American country that produces an appreciable export quantity. The exportable sugar supply in 1946 will be somewhat below normal, however, Otherwise the prospects are for about average production, exports, and requirements.

The estimated exportable supply of sugar in 1946 is 276,000 short tons as compared to 333,000 tons annually in prewar years. Estimated production in 1946 is 441,000 tons as compared to 400,000 in 1945 and 448,000 tons annually prewar. Production during recent years has been reduced by a labor shortage, and, more important, by a continuing scarcity of fertilizers, particularly of guano, which has had an adverse effect upon yields. Unsold sugar stocks are reported to be negligible. National consumption is expected to continue upward in 1946, particularly in view of plans to establish beverage bottling plants.

Under its program of guaranteed purchase of beans, the Peruvian Government has accumulated a stock of them, about half of which, or about 5,500 short tons, will be available for export in 1946. Peru probably will

be self-sufficient in rice production in 1946. Except for sporadic shortages in the Lima-Callao area, it is self-sufficient in meats. To overcome such shortages, up to 10,000 tons of meat generally are imported, mainly from Argentina. Normally Peru imports from 3,000 to 5,000 tons of fruits, chiefly bananas and citrus, largely from Ecuador and Chile, respectively.

Because of recent reductions in Peruvian cotton acreage and consequent reduction in output of cottonseed oil, unprecedented quantities of lard have been imported almost entirely from Argentina. With a probable expansion of cotton acreage, and the relaxation of cottonseed oil consumption restrictions, lard import requirements should be less in 1946 than in 1944 and 1945.

Production of canned fish, which is available largely for export, will increase sharply in 1946, and offerings have been made on about 50,000 tons of salt fish.

Bolivia

As usual, large quantities of food will have to be imported by this country to make up for insufficient domestic production. Unlike most other South American countries, Bolivia did not tend to become more self-sufficient during World War II, because a high wartime level of mining activity increased consumer demand and drew laborers from farms.

During the latter months of 1945, acute shortages of wheat and wheat flour developed in the Bolivian market as a result of insufficient shipments from Argentina, attributed by the Argentina Government to a lack of railroad cars. The situation was alleviated by the shipment of 11,000 short tons of wheat from the United States.

A shortage of meat developed in Bolivia in 1945 as a result of the same factors that created the wheat and flour shortage. The Bolivian Government alleviated this shortage by flying fresh meat, which had been slaughtered in the tropical cattle-raising zones of eastern Bolivia, to La Paz on the Altiplano, a region which ordinarily is isolated from the production region because of the absence of suitable roads. This service probably will be continued in 1946.

It is estimated that from 10 to 40 percent less acreage than normal is being cultivated this season (1945-46) because of difficulties encountered with farm labor. Nevertheless, prevailing favorable crop conditions indicate that the 1945-46 yield on the reduced acreage may be as great as that of 1944-45, when growing conditions were less favorable.

Normally, however, Bolivia relies heavily upon imports, which usually necessitates the importation of several thousand head of cattle, sheep, and hogs and the following quantities of commodities in terms of short tons, most of which generally come from the Argentine: wheat and wheat flour, 50,000 to 60,000; sugar, 25,000; rice, 8,000; lard, 3,000;

powdered and canned milk, 2,000; fresh and dried fruits, 2,000; meat and meat products, 700; edible oils, 700; and butter, 400.

Chile

With the exception of sugar and beef, Chile is largely self-sufficient in food production. Since 1939, Chile has changed from an importing position to a heavy surplus producer of rice. Vegetable-oil production also has been expanding. However, there have been greater imports of cattle and sugar and these will need to be maintained in 1946.

During 1937 and 1938, Chile exported agricultural commodities averaging 32 million dollars in value annually, while annual imports were valued at slightly more than half this figure. During 1942 and 1943, however, the value of agricultural exports was about 26 percent less than that of agricultural imports.

Sugar and cattle are the principal imports. Since 1937, Chilean imports of Argentine cattle for slaughter have been increasing and have consitituted the major element in the shift in trade balance. Cattle imports in the first 9 months of 1945 reached an all-time high of 190,000 head which is more than twice the 91,000 head imported during the corresponding period in 1944, and 66 percent above January through September importations in 1943. Because of this increase, the import quota was reduced for the last quarter of 1945. Chile imports large quantities of sugar from Peru, and importations of this commodity have been increasing likewise. On a quantitative basis, imports of raw sugar for the period January through September, inclusive, was 104,000 short tons in 1943; 107,000 tons in 1944; and 117,000 tons in 1945. Wheat is imported in some years and exported in others, but there are generally exportable quantities of barley and oats.

If 1945 consumption levels are to be maintained, Chile will need to import large numbers of cattle for slaughter in 1946 as well as appreciable quantities of the following principal commodities; sugar, sunflower-seed, animal fats and oils, bananas, butter, meats and meat products, wheat, and vegetable fats and oils.

Chile's anticipated exportable surplus of principal foodstuffs for 1946 is as follows in terms of short tons: rice, 54,000; dry edible beans, 38,000; barley, 16,000; oats, 14,000; lamb and mutton, 13,000; fruit, 11,000; peas, 9,000; fish, 5,000; honeydew melons, 3,000; and chickpeas, 1,000.

Paraguay

The domestic food situation in Paraguay during 1946 is expected to be much improved over 1945, when drought reduced production of many foods. The principal deficit item is wheat, which is imported from Argentina. Prewar imports averaged 35,000 to 40,000 short tons annually. Aside from small quantities of pineapples, the only 1946 export product will be meat. Total slaughter for the country is estimated at 500,000 head of cattle, 175,000

head of which will be in the packing houses. Exports of meat products are expected to be 18,000 short tons, or one-third more than in the last prewar year, 1939. With increased prices and continued favorable pastures, exports could be doubled. Mid-year rains continuing into October broke the severe drought, increased the harvests in late 1945, and stimulated increased plantings for harvest in early 1946. Because of a short sugar crop in 1945, production supplied only half of domestic requirements. Prospects for 1946 are for a record crop of more than 20,000 short tons, but imports will be needed in the first half of the year. Production of corn and fats and oils are expected to meet requirements.

Uruguay

The outlook is bright for increased harvests of food products in early 1946. The drought, which reduced crops in 1945, was broken in August, and increased plantings were possible in late 1945. The only food export anticipated for the year 1946, however, is meat. Total estimated exports of under 110,000 short tons are one-third less than prewar. On a carcass-weight basis, they will probably be divided as follows: 89,600 short tons of beef and veal, 15,000 of lamb and mutton, 2,400 of pork, and 1,900 of edible offal. Usually Uruguay has a small exportable surplus of wheat, but during 1946 imports of this grain as well as other grains were necessary. Shortages also occurred in sugar, potatoes, fruit, vegetables, and eggs. Although supplies will probably continue tight during the first quarter of the new year, increased production should provide domestic food requirements during the balance of 1946.

BRITISH ISLES -- SUMMARY

The crop output in this area in 1945 was generally good, but, because of increased dependency upon imports that are in short supply, the food situation will not be quite as good as in recent years. Due largely to the reduction of wheat acreage, the total food output in the United Kingdom declined in 1945, and food reserves have been reduced to such an extent that larger imports will be needed for the year 1945-46 than last year. In Eire, where the 1945 wheat acreage was four percent above 1944 and crop yields especially good, the domestic supply of wheat this year will come nearer meeting domestic food needs.

Farmers in the United Kingdom last year tended to place more emphasis upon the output of feed grains and livestock, and less upon that of food crops. The wheat acreage and production in 1945 were one-third below 1944. In view of short world grain supplies, all grain imports are still being directed toward use for food rather than for feed purposes, and the flour extraction rate has again to be raised to 85 percent. Restoration of the livestock industry is at present being retarded considerably by the unexpectedly severe shortage of feed grains available for import. Gradually increasing numbers of store (feeder) cattle are being produced in Eire which, together with other livestock products, are being made available for export to the United Kingdom. Butter, cheese and sugar rations have been voluntarily reduced in Eire in order to contribute towards relief on the continent of Europe. There, also, the rate of increase in the output of livestock products is hampered by the continuing difficulty of importing feedstuffs.

United Kingdom

Summary.

Food supplies in the United Kingdom promise to be somewhat more restricted in 1946 than for several years past. The country's adults are estimated to be receiving on an average of 2,800 to 2,900 calories per capita daily. Civilian rationing will be retained, stabilized, at or near its present level, with but minor seasonal fluctuations in the available quantities of individual items.

From an agricultural production standpoint, 1945-46 is characterized by a trend toward increased production of livestock products and feed crops, and away from such food crops as wheat. The decline in wheat acreage is being largely offset by an expansion in the acreage of feed grains. While such adjustments in the nation's agricultural production resulted in some decrease in the total output of food products in 1945, the expansion in livestock numbers can be expected to be reflected in increased marketings in 1946.

Because of the decline in wheat production in 1945 and a reduction in reserve stocks of food resulting from contributions to continental relief, the United Kingdom is more dependent upon imports in 1945-46 than in 1944-45. In order to maintain the level of the present restricted diet during this year, it needs to import approximately 5 million short tons of cereals, mostly wheat; 1,750,000 tons of meat; 1,500,000 tons of sugar; 1,000,000 tons of oils and fats, including butter; and about 300,000 tons of other dairy products, mostly canned milk and cheese.

Prewar and Wartime Situation.-- Prewar, the United Kingdom was the world's leading food-importing nation. Of its wheat requirements, 80 percent originated abroad, as did 60 percent of the barley used. Oats were almost entirely a domestic product. All corn and rice needs were met by imports. Only one-fifth of the country's sugar requirements were refined from domestic beets, with sugar imports furnishing the remainder. Potatoes and other vegetables were domestically produced. Half of the decidious and all of the citrus fruits used were brought into the country.

Somewhat less than half of the beef and veal, approximately 60 percent of the mutton and lamb, and slightly more than half of the pork needed before the war were imported. Also in the prewar period, about 9,500,000 short tons of feedstuffs were imported. Eire was the source of some 700,000 store or feeder cattle annually. Poultry and fish were almost exclusively domestic products. Nearly all of the United Kingdom's fresh-milk supply was domestically produced, but the bulk of the butter and cheese consumed was of foreign origin. Imported shell eggs amounted to 40 percent of the total supply.

During the war, wheat shipments were well maintained, but those of barley, corn, and rice practically ceased. Incoming sugar was limited, while all fresh-fruit imports were stopped. Home output of the small grains, sugar beets, potatoes, and of other vegetables was greatly increased. Beef and veal shipments were reasonably well maintained; those of mutton, lamb, and pork not so well. The poultry and fish output was drastically reduced. Imports of dairy products greatly lessened, while those of shell eggs almost ceased.

1945-46 Situation.--Food consumption by the average British civilian in 1945-46 is little different than it has been for several years past, and rationing will be continued. At the close of the war, the Government announced that until such time as the country's future position with regard to agricultural imports and industrial exports could be more accurately determined, the pattern of its wartime economy would continue to be rather closely followed. The current level of food production, including adjustments for imported feedstuffs and store (feeder) cattle, is about 60 percent above the immediately prewar average, and approximately 5 percent below last year.

The Government has just announced that, due to an unexpectedly critical supply and import position, the wheat extraction rate must be

raised again to at least 85 percent. The butter, margarine, and cooking fat ration is to be reduced from 8 to 7 ounces per person per week. Beginning February 17, the per capita weekly milk ration will be seasonally increased from 2 to 2½ pints. A little more canned fruit is expected to be available soon.

The accompanying tables illustrate current changes from the prewar period in the production and consumption of individual food items.

TABLE 1

UNITED KINGDOM: Production and trade in food products, 1934-38 and estimated production 1945-46, by major commodity groups.

Commodity	Estimated production 1/		Domestic production available for food 1/		Net imports
	1934-38 average	1945-46	1934-38 average	1945-46	1934-38 average
	1,000 short tons	1,000 short tons	1,000 short tons	1,000 short tons	1,000 short tons
	(1)	(2)	(3)	(4)	(5)
Wheat	1,921	2,380	675	2,000	6,067
Flour	-	-	-	-	469
Oats	2,225	3,581	129	225	129
Oatmeal and flakes	-	-	-	-	25
Barley	862	2,320	557	1,050	994
Pearl barley	-	-	8	-	8
Potatoes	5,524	10,933	3,955	7,928	230
Sugar, raw domestic beet	505	600	505	600	2,192
Beans and peas, dried	26	-	22	-	165
Other vegetables (fresh	4,301	-	4,301	-	487
(canned	41	-	41	-	167
Fruit (fresh	493	-	485	-	1,538
(dried	-	-	-	-	191
(canned (solid juice)	78	-	77	-	214
Beef and veal	701	564	701	564	673
Mutton and lamb	268	146	268	146	372
Pork, bacon and ham	425	257	422	257	495
Meat offals	110	-	110	-	58
Canned meat	-	-	-	-	71
Milk, fluid, human consumption	5,176	2/ 7,069	5,176	2/ 7,069	2
Butter	53	2/ 18	52	2/ 18	532
Cheese	50	2/ 21	49	2/ 21	158
Poultry	74	-	73	-	24
Eggs, shell	343	2/ 213	343	1/ 207	178
Fish, (fresh	1,142	-	885	-	118
(canned	8	-	3	-	82
Corn	-	-	-	-	351
Rice	-	-	-	-	120

1/ Preliminary.
2/ 1944-45.

TABLE 2.

Estimated supplies moving into civilian consumption in United Kingdom, prewar to 1945.

Commodity	Pound per head per annum, retail weight, except meat, coffee, cocoa, as specified			Percentage of 1935-39	
	1936-39	1944	1945	1944	1945
Milk & milk products, excluding butter. Total milk solids	38.3	48.7	49.8	127	130
Meat and edible offal (as carcass weight)	131.7	115.0	103.4	86	79
Poultry, game, & fish (edible weight)	31.0	23.5	27.1	76	87
Eggs & egg products (fresh egg equivalent)	24.4	23.7	24.9	97	102
Oils & fats (fat content)	45.5	38.9	35.6	85	78
Sugars & syrups (sugar content)	109.8	75.6	71.2	69	65
Potatoes & sweet potatoes	176.0	282.2	278.1	160	158
Pulses & nuts	9.6	7.5	7.0	78	73
Tomatoes & citrus fruit (fresh fruit equivalent)	46.3	31.4	32.6	68	70
Other fruit (fresh fruit equivalent)	93.3	70.5	68.0	76	73
Leafy green & yellow vegetables	82.1	102.1	99.2	124	121
Other vegetables	47.2	47.4	47.9	100	101
Grain products	210.5	251.1	250.6	119	119
Beverages (tea, coffee & cocoa)	14.7	12.8	13.6	87	93

As compared with immediately prewar years, meat consumption has declined 19 percent and that of fats, including butter, by 16 percent. However, the use of other dairy products is 26 percent greater. Grain consumption has increased by 17 percent; that of potatoes 61 percent. Fruit supply is less by 30 percent; that of sugar by 31 percent. In terms of calories, the farm output of food crops is about 10 percent less in 1945-46 than last year. The caloric production of livestock products may be about 5 percent greater.

CONTINENTAL EUROPE

Summary

Current Food Situation.- A serious drought in large parts of continental Europe during 1945 combined with damage and dislocations due to military operations and occupation has resulted in a much smaller food supply from domestic production than was available in any of the war years. Consequently, the food situation during the current consumption year 1945-46 is generally far from satisfactory and even critical in certain areas.

Despite low production, great improvement in consumption levels was registered in the last half of 1945 in a number of countries including Belgium, Netherlands, Norway, France, and Greece, where consumption rose substantially above wartime levels. This improvement in considerable measure was due to the large shipments of foodstuffs that have moved into these areas since their liberation from enemy control. However, the increases in the quantity of food allowed to go into consumption during the last half of 1945 appear to have been based upon the expectation of a total level of food imports during 1945-46 that cannot be realized. In these circumstances it is likely that the food intake in those countries will average lower in the first half of 1946 than in the second half of 1945. This prospect is the more probable since, in the first flush of victory and liberation, measures tending to conserve domestic supplies for food uses had been relaxed or entirely eliminated when maintenance or even tightening of domestic controls would seem to have been indicated. In some countries flour extraction rates were lowered, restrictions on the feeding of cereals other than wheat were removed, and livestock herds hastily increased; in France bread was temporarily derationed. The impact of such measures was bound to strain the supply situation within these countries.

While in these areas, where improvement at least in the last half of 1945 was substantial, the outlook for the remainder of the season is for a decline in food consumption from the elevated levels gained after years of severe wartime restriction, the general food situation has continued unsatisfactory or become even dangerously unfavorable in other areas, mainly the exenemy countries. Food consumption by the urban population in Italy, Germany, and Austria on the whole remained very low - too low to sustain health and working capacity for any length of time. With the shortage in world supplies even of wheat, it is improbable that conditions can be relieved in the near future. In fact, the extent to which home supplies in these countries have been drawn upon so far this season makes large imports for the rest of 1945-46 a necessity if only to maintain, let alone increase, present low standards of consumption. These standards have been viewed with grave concern by Allied nutrition experts, and urgent recommendations for their early substantial increase have been made.

There are other dark spots in the continental European picture. Fragmentary as statistics and other information on Eastern Europe are, it appears sufficiently certain that conditions in many urban and deficit rural areas of that part of the continent are extremely unsatisfactory, if not serious. The effects of war, occupation, and social reforms in these countries have greatly disturbed production and reduced livestock, capital and farm equipment, turning areas of surplus production into deficit regions at least as far as the current season is concerned. Destruction and removals in industry and transport have generally added to the gravity of shortages here and there, which, under normal circumstances, could be relieved by shipments from nearby surplus areas. In urban and deficit rural districts of Poland - fought over and looted more than once - of Yugoslavia, Hungary, and Rumania, the food situation of segments of the population is grave. In Finland, too, the situation continues unfavorable.

At the southwestern tip of Europe, Portugal and especially Spain find themselves in difficult conditions. Never accustomed to a more than frugal standard of nutrition, these countries have experienced even further declines in their food supply from reduced wartime levels, and there may be another reduction in consumption during the coming months. The severe drought which struck the Mediterranean countries in the last growing season is chiefly responsible for the added difficulties.

In the few remaining areas on the Continent, the food situation is and promises to remain reasonably satisfactory. Denmark and Sweden continue to enjoy a high food consumption level; they both have made significant contributions to filling the needs of deficit areas - Denmark through sizable exports of animal products from surpluses out of current production, Sweden through substantial shipments from stocks of grain, sugar, and fats to help alleviate the shortages in Finland and Norway in the past season.

Switzerland, though with less food at its disposal than up to the middle of 1944, maintained a passable level of consumption in the second half of 1945, considerably above the low point reported for the end of 1944. Maintenance of the improvement is dependent upon imports from now on and further withdrawals from reserves. Finally, Czechoslovakia, which emerged from this war with its resources relatively well preserved, has also been able to secure for its nationals a tolerable level of living in the current season.

On the basis of their nonfarm consumption levels toward the end of 1945, the continental European countries may be classified in roughly three groups, as follows:

1. Areas with an average nonfarm consumption of less than 1,900 calories per person per day:

   Spain; Italy; segments of Poland, Hungary, Rumania, and Yugoslavia; Germany; Austria; Finland; Portugal.

2. Areas with an average nonfarm consumption of from 2,100 to 2,500 calories per person per day:

   Greece; France; Czechoslovakia; Switzerland; Norway; Netherlands; Luxembourg; Belgium..

3. Areas with an average nonfarm consumption of over 2,800 calories per person per day:

   Sweden; Denmark.

Only the third group of areas can be said to have an adequate energy intake. The second group, at the end of 1945, was tolerably well supplied - but may experience a decline in its restricted food standard during the first half of 1946. The first group of areas is sorely deficient in regard to total energy and almost every nutrient. The effects of malnutrition, hunger, and even starvation in this group are apparent and may become aggravated before the new harvest is in.

Slump in Continental Production.- The unsatisfactory food situation in the current season is due to the great decline in the Continent's own production. With output at 1944-45 levels, available imports would have sufficed to remove the spectre of hunger and disease even from the worst areas. Actually total farm output in 1945-46 was probably about 15 percent below 1944-45 or 25 percent below the prewar average. The amount of food available from this output, because of the shifts in its utilization compared to prewar, may still be estimated at about 20 percent below the prewar average.

The decline in 1945-46 production was due to a number of factors, both natural and man-made. Excessive rain had hampered fall and winter sowing, affecting mainly bread grain, in much of Europe. In the spring a severe drought developed throughout the Mediterranean region from Portugal and Spain to Greece. Moisture deficiency later in the year was also reported in many areas north of the Mediterranean region, while some parts of the Continent near the North Sea had extended rains at grain-harvesting time.

Dislocation of farming activities was especially apparent in Eastern Europe, including parts of Germany and Austria, as well as Poland and the Danube Basin. This region has felt the impact not only of military operations but also of occupation and extensive social changes, population transfers, land reforms, alteration of farm controls,

and heavy losses of livestock, farm machinery, and transport vehicles. Much land remained unsown and an additional area unharvested. In Western Europe the major depressive factors, aside from the weather, seem to have been another sharp contraction of fertilizer deliveries to farmers, an acute shortage of fuel, disorganized transport, and a further deterioration of agricultural and food controls.

Production Outlook for 1946-47.- General considerations as well as reports from the field giving actual sowings and weather conditions in a number of countries, make it appear probable that continental European food production in the consumption year 1946-47 will be larger than in 1945-46, though still considerably below prewar.

In general, acreages sown to fall crops, mainly bread grains, in Western Europe as well as the Mediterranean countries, are above last year - in France considerably above. Weather conditions during the fall and winter in those areas have also been favorable, and it appears most unlikely that the disastrous drought which in 1945 reduced production so much in the Mediterranean countries will recur this year. Compared to the probable weight of these favorable factors likely to operate in Western and Southern Europe, the adverse influence of other factors will not change this outlook in significant degree. There is a shortage of draft power in Italy and of manpower in countries like Belgium and Switzerland and probably France despite a recent increase in the labor supply. There are also shortages in fertilizers in the area as a whole, but some improvement compared to last year is evident even in that respect. The production outlook in the Scandinavian countries is for little change compared to 1945, and reasonably favorable in Czechoslovakia and Switzerland.

In Eastern Europe, prospects for 1946-47 production are much less encouraging. While it is probable that crop production even in those countries, will be above the very low levels of 1945, the possible increase will be limited by such important factors as shortages of draft power and equipment, land reforms, which, in important producing regions, have lowered at least for the time being producing efficiency, and in some areas also by manpower shortage. Some of these influences have already shown up in the results of the fall-sowing campaign, which generally in Eastern Europe, including the eastern parts of Germany and Austria, has been disappointing. Some land has remained uncultivated, and the outlook is definitely for acreages and production much smaller than prewar.

Finally, the outlook for agricultural production in Germany and is not promising anywhere. The United States, British, and French occupation zones appear to have enough draft and manpower but little commercial fertilizer, and there also seems to be a lack of spare parts and new machinery. In the Russian zone of occupation, draft power is seriously short and may be the decisive shortage in the outlook for next year's production.

Food Outlook for 1946-47.- The food outlook for the coming consumption year 1946-47 on the continent of Europe is for continuance of large import needs. Wheat and fats will remain in urgent demand, and there will be considerable interest in imports of feedstuffs to make possible expansion in livestock numbers or maintenance of the increases reported to date. Import requirements for animal products, in terms of physical need, will also be large, but effective demand will doubtless be greatly restricted by general economic conditions and the necessity in all countries of conserving international buying power.

The continuance of large continental import requirements in 1946-47 seems probable even with good recovery in domestic production. While the Continent in 1946-47 will produce more grain and sugar, there is little prospect for more than a modest increase in fats and livestock products. And as over-all production increases, there will be a tendency toward increases in consumption as well. For, it should be noted, current rates of energy intake, even with present imports, are still below prewar in most countries, and the composition of the diets is far below prewar standards, with milling extractions still unduly high and supplies of fat and animal products unduly low. Improvements in both amount and composition of food will require total food and feed supplies considerably larger than those available in 1945-46.

Explanatory Note.- In the following discussion of continental countries, reference is made to food consumption in a number of ways. Supplies or consumption per caput of the total population - a rough measure of comparison as among comparable countries or between different periods of time - include the farm population which in most countries is much better supplied than the urban group. In order to narrow comparisons down to those segments of the populace where the food shortage actually begins, the concept of consumption per caput of the nonfarm population is introduced. Furthermore, since one of the crucial shortcomings of emergency food standards is the inequality of distribution, additional estimates are given for the average nonfarm ration (legally distributed and mostly available to all) and average supplies outside the ration - that is, either unrationed foodstuffs or supplies obtained in the black market (distribution of which is largely inequitable). Finally, further to characterize inequalities of distribution and the probability of the existence of hunger and need, even where average consumption figures appear tolerable, a few data are presented as to the ration of the so-called "normal consumer" - the basic adult urban group that does not enjoy the privilege of additional rations such as those given to heavy workers. It should be noted that the "normal consumer" group in many countries includes fully 40 or 50 percent of the total nonfarm population.

France

Summary

In the last half of 1945 food consumption appears to have been around 2,400 calories per person per day (excluding alcoholic beverages). This represents a considerable increase over wartime levels, though remaining well below the prewar average of 2,800 calories. While maintenance of an average of 2,400 calories daily during the remainder of the current consumption year may not be possible despite the fact that imports will be larger than in the first part of the season, food supplies in 1945-46 as a whole are expected to show an increase compared to the war years.

With present prospects indicating some recovery of production in the coming year, food supplies are likely to show a further increase in 1946-47 unless imports are cut materially below the level anticipated for 1945-46.

Prewar and Wartime Situation

Before the war France, with a comparatively high standard of nutrition, produced some five-sixths of its food supplies. The country was virtually self-sufficient in wheat. It imported one-seventh of its sugar consumption. Most of the meat and dairy products were furnished by the domestic livestock industry, but the latter was partly dependent upon imported feed. The deficit in oils and fats for food was heavy, running over 40 percent.

During the war, farm output was restricted by shortages of labor, draft power, fertilizer, and feed, by poor weather conditions in some years, and by unfavorable economic conditions. A shift in the use of crops from feed to food prevented the drop in gross farm output from being fully reflected in the production of food for human consumption. The most important factor in this shift was the increase in flour extraction. Such gains were more or less offset, however, by the delivery of substantial amounts of food to Germany and the sharp decline in imports, which were almost completely cut off after the Allied landing in North Africa in November 1942. French food supplies in the last year of occupation (1943-44) provided an average of 2,150 calories per person per day, or three-fourths as much as in prewar times. The average increased somewhat in 1944-45, when, though production showed a decline, German requisitions ceased and imports began to come in from overseas.

Inequitable distribution of the small wartime supplies aggravated the food situation. The farm population as a whole continued to live well. Other consumers with money to pay high black-market prices or with relatives and friends in the country consumed more than their share of the nonfarm supplies. A large proportion of the population, however, could supplement by little the official rations. The latter,

as a result of diversions of food from official channels of distribution and continuing transportation difficulties, had to be adjusted not to total supplies but to the quantity that could be collected and shipped. Foodstuffs officially distributed in Paris provided a daily per capita average of 1,194 calories in 1941, 1,239 in 1942, and 1,173 in 1943. This average dropped below 900 calories in the first half of 1944, and then recovered, but not before the spring of 1945 did it rise above 1,400 calories.

Review of 1945-46 Consumption Year

In 1945 France had an unusually poor harvest, largely as a result of excessive rain and cold during the planting season for winter grain and dry weather during the late spring and summer. Recent information indicates that home-grown food supplies in 1945-46 will be still smaller than was forecast earlier and below the record wartime low in 1940-41, amounting, in terms of energy value, to 1,700 - 1,800 calories per person per day, as against an average of over 2,300 before the war when the population was slightly larger than at present.

FRANCE: Production and trade in food products 1933-37, and estimated production 1945-46, by major commodity groups 1/

Commodity	Estimated total production		Domestic production available for food		Net imports	Net exports
	1933-37 average	1945-46 prelim.	1933-37 average 2/	1945-46 prelim.	average 1933-34 to 1937-38	average 1933-34 to 1937-38
	- - - - 1,000 short tons - - - -					
Grains	17,104	10,430	8,050	5,020	3/ 457 (for food)	
Grains for food, in terms of flour			5,820	4,255	408	
Sugar, refined	915	440	915	440	149	
Potatoes	16,959	11,025	5,440	4,400	72	
Meats (carcass weight) 4/	2,080	1,575	2,080	1,575	5/ 55	
Fats for food (as products)	431	276	431	276	358	
Whole milk for fluid consumption 6/			3,945	2,620		35

1/ Some allowance has been made for underestimation of 1945-46 output by official production figures.
2/ For complete prewar food balance, giving also per capita consumption, see Appendix.
3/ Includes rice in terms of milled.
4/ Includes poultry and rabbit meat.
5/ Includes live animals in terms of meat
6/ Includes processed milk in terms of fresh.

The downward revision of earlier 1945-46 food production estimates reflects mainly a downward revision of the estimate for wheat. Even allowing for considerable understatement by official figures, the 1945 wheat crop appears to have been the shortest in 25 years. Production of other grains also fell short of prewar harvests. Potatoes in 1945 were reported to have been especially hard hit by the drought. On the other hand, autumn rains came in the north in time to benefit sugar beets, and with good prospects of sufficient coal to process the crop, sugar production is likely to show a marked increase compared with last year, though it will probably not reach half the prewar average. Output of meat and dairy products cannot be expected to approach prewar levels until feed supplies recover and livestock numbers are reconstituted. However, great progress toward such reconstitution appears to have been made, with cattle, sheep, hog, and horse numbers recently reported to be considerably above 1944.

Consumption appears to have been running at the rate of 2,400 or more calories per person per day in the last half of 1945. An average of 2,400 calories for the total population means an average of about 2,200 for the nonfarm population, allowance being made for higher consumption on farms. Rations, both nation-wide and local, reportedly have had an energy value of around 1,500 calories since early summer, the amount varying from place to place; in October, food officially distributed provided a daily average of over 1,550 calories per person in Lyon and Marseilles, and over 1,650 in Paris and Montpellier. In addition, city consumers are said to obtain a daily average of 500 - 800 calories from unrationed and black-marketed food.

A further increase in consumption took place in November and December, when bread was derationed. The move was premature, however. Wheat collections from farmers proved disappointing, and it seems that total supplies of wheat for the remainder of the current consumption year will not be large enough to keep bread off the ration. In January 1946 bread was again rationed at 300 grams per day for the "normal consumer," as compared with 350 grams from October 1944 to November 1945, 300 grams from November 1943 to October 1944, and 275 grams from April 1941 to November 1943. The fat ration of "normal consumers" was raised to its present level of 750 grams per month in October, the meat ration to 250 grams per week in November; the sugar ration remained at 500 grams per month.

Outlook

Present prospects for a recovery in crop output in 1946 are good. Weather conditions this fall, in contrast to last, favored field work; wheat plantings to January 1, 1946, were over 1 million hectares (2.5 million acres) larger than on January 1, 1945. Plantings of other cereals are also reported considerably above a year ago. Returned French war prisoners and deportees, together with some German war prisoners (about 180,000 in agriculture as of the end of November), have increased the labor supply. Draft power and machinery supplies are fairly adequate.

Supplies of manure and phosphate fertilizers are still short, but expected deliveries of nitrogen and potash fertilizers are up to prewar consumption. Since weather conditions in the coming spring and summer are unlikely to be as unfavorable as in 1945, yields may well show substantial improvement.

Belgium

Summary

Estimates of food consumption in Belgium during the last half of 1945 indicated an average per capita intake of 2,550 calories, representing a substantial improvement over the 2,000-calorie level of the war years but falling about 17 percent below the prewar consumption level. To what extent this consumption can be maintained through the first half of 1946 will depend on the size of imports.

Domestic output for consumption in 1946-47 should be substantially higher than in the current year, when natural and economic factors prevented the full use of the country's agricultural resources so that a total of only 1,200 calories can be provided from home production.

Prewar and Wartime Situation

Before the war Belgium was only 50 percent self-sufficient in foodstuffs. Its heaviest deficit was in bread grains, of which it imported about four-fifths of total requirements. In sugar it was almost 90 percent self-sufficient. Meat production, excluding meat produced from imported feedstuffs, provided 55 percent of total consumption, and fat production on the same basis approximately 20 percent.

When feed imports were cut off during the war and when production and crop utilization were diverted from feed to food, the output of livestock products declined sharply. These diversions, however, increased the output of ultimate food energy to such an extent that total food supplies of domestic origin rose about 40 percent above prewar levels. Wartime imports were limited to bread grain in quantities providing about five percent of the total consumption of all foodstuffs. By 1943-44 the average calorie intake was estimated at about 2,100 calories per person per day, declining to around 1,900 in the first part of the 1944-45 season, but rising again as Allied imports began to come in in significant volume.

Assuming that the farm population maintained approximately its prewar level of consumption during the war period, the food intake of the nonfarm population was probably at no time above 2,000 calories, and for extended periods considerably below this level. The general development in the food situation can be traced in the following figures:

Year	Domestic food production	Food imports	Average total consumption	Average nonfarm consumption	Average normal consumer rations
	(in calories per capita per day)				
1934-38	1,400	1,500	2,800	2,900	-
1943-44	2,000	100	2,100	1,875	1,500
1944-45	1,800	1/ 400	2,200	2,000	1,650

1/ Estimate of amounts of Allied imports consumed within the year in question.

Review of 1945-46 Consumption Year

Domestically-produced food supplies will provide an average of about 1,200 calories per capita per day to the Belgian population during 1945-46, compared to 1,400 before the war and from 1,800 to 2,000 in the war years. This represents a lower production than earlier official and unofficial estimates indicated. The present estimate allows for some underestimation of the grain crop.

Bread-grain production will adequately supply the farm population, while commercialization, representing the amount available for nonfarm consumption, will probably be less than one-fourth the volume of the last two war years. Reports are that deliveries of wheat were meager after the harvest and that the use of rye (as well as barley) for feed, which has been officially sanctioned, will probably leave very little of the crop for use as food.

Estimates of sugar production now place it at less than half the prewar average, due to the low acreage planted, which can be attributed to dissatisfaction with prices, to the labor shortage, and to greatly reduced yield. Potato production declined greatly, and although the tentative official estimates seem low, it is likely that little more than two-thirds of the production level of the war years or one-half of prewar production has been reached.

The output of livestock products, around which much of the agricultural interest is centered, has increased very little, but livestock capital, as reflected in the number of head of cattle and pigs in May 1945, had already increased to levels approaching those of 1939. The 1945 census for pigs shows a rise of over 40 percent from the preceding year.

BELGIUM: Production and trade in food products 1933-37, and estimated production 1945-46, by major commodity groups

Commodity	Estimated total production		Domestic production available for food		Net imports
	1934-38 average	1945-46 prelim.	1934-38 average 1/	1945-46 prelim.	average 1934-35 to 1938-39
	- - - - 1,000 short tons - - - -				
Grains	1,830	1,290	305	419	1,229 (for food)
Grains for food, in terms of flour	-	-	223	331	933
Sugar, refined	235	135	225	135	31
Potatoes	3,540	1,764	1,390	926	-
Meats (carcass weight) 2/	397	198	397	198	23
Fats for food (as products)	111	66	111	66	71
Whole milk for fluid consumption			705	550	22

1/ For complete prewar food balance, giving also per capita consumption, see Appendix.
2/ Includes poultry and rabbit meat.

The number of cows was only 1 percent less than a year earlier and at 806,000 head was only 80,000 below the May 1939 figure. Young cattle numbers (under 2 years) increased by more than 20 percent from a year earlier, the young heifers (1 to 2 years) having increased by nearly 50 percent. The rebuilding of the cattle herd thus appears to be well under way, though its ultimate pace will depend on the availability of feed supplies.

At average levels from August to December 1945 per capita consumption in Belgium stood at about 2,550 calories per day. Assuming the intake by the farm population at 2,900 calories, a nonfarm consumption of about 2,500 calories was indicated. Of this nonfarm supply, about 2,100 calories were derived from official rations, the rest coming from unrationed or illegal consumption.* Considering the low level of domestic production and having regard to imports through December 1945, it is obvious that the present intake of food can be maintained only if imports to the end of the consumption year continue substantial.

*) The "normal consumer" ration was about 1,950 calories per day.

Outlook

There should be marked improvement in agricultural output for the 1946-47 consumption year, both for crops and for livestock products. Fine weather characterized the fall planting season, and in early January small grains were reported in good condition. Good progress was also reported in preparing the fields for early sowing of sugar beets and spring grains. Although a great shortage of farm labor still persists, draft power and machinery are said to be adequate, and although potash will be short of requirements, sufficient supplies of nitrogenous and phosphatic fertilizers are available. The great increase in pig numbers should result in a rise in pork and lard production in the coming year, and increasing cattle and chicken numbers warrant expectation of somewhat higher levels of milk and egg output, provided sufficient feed supplies can be obtained.

Luxembourg

In the Grand Duchy of Luxembourg, consumption levels in December 1945 probably averaged about 2,500 to 2,600 calories per capita per day (2,400 for the nonfarm population). During the war, consumption levels for the country as a whole were probably about the same as they are now, but the urban population now is definitely better off.

While no exact figures on the prewar food position are available, due to the absence of separate trade data for Luxembourg, which participates in a customs union with Belgium, it is probable that Luxembourg enjoyed a high level of consumption, at least one comparable with that of Belgium, and perhaps higher, due to the larger proportion of the farm population. If an average of 3,000 calories is assumed for the prewar period, the general average of current consumption is around 15 percent below prewar levels.

While food production in 1945-46 suffered seriously from the fighting which took place over a large part of the country in the early part of 1945, prospects for 1946-47 production are good. If seed and fertilizer requirements can be met, a considerable degree of recovery is to be expected.

Domestic production of foodstuffs in 1945-46 will be sufficient to supply approximately a daily average of 1,400 calories per capita of the total population. This is roughly 40 percent below the levels of prewar years, based on estimated production for the years 1933-37, and about as much below food output during the war period, when high levels of production were maintained. Heavy declines in the output of grains and potatoes in the current year and a lesser decline in livestock products are reported. If the farm population obtains foodstuffs providing around 2,800 calories per day from domestic resources (imported sugar adds considerably to this figure), the nonfarm population may expect to obtain about 850 calories from domestic production.

Rations (2,300 calories) and estimates of the average consumption of the few unrationed foods (100 calories) indicated a per capita intake of 2,400 calories for the urban population at the end of 1945. Because of the small amount of food available to urban consumers from domestic production the maintenance of that level is clearly dependent on imports to a very large extent.

Netherlands

Summary

After 6 months of greatly curtailed food intake for half the urban population of the Netherlands, the ration levels showed a considerable increase beginning in June 1945. In the second half of 1945 total food intake for the population as a whole averaged 2,600 calories per person per day (2,500 for the nonfarm population). This compares with an estimated per capita consumption during the war of only about 2,100 calories. Prewar consumption was 2,800 calories per day.

Domestic production of food in 1946-47 is expected to increase, due in part to larger acreages but mainly to improved yields.

Prewar and Wartime Situation

Before the war the Netherlands imported about one--fifth of its requirements in foodstuffs and almost an equal amount was produced within the country from imported feeds. In food grains the country was only 40 percent self-sufficient, while large amounts of the grain grown domestically were used for feed. About 80 percent of the sugar consumed came from domestic production. After making adjustments to exclude production based on imported feedstuffs, the country is estimated to have been 55 percent self-sufficient in meats and 35 percent in fats before the war.

When the war stopped all imports and the country's entire food and feed supply depended on domestic production, emphasis was placed on producing more bread grain and potatoes for food, and more oilseeds, while livestock numbers were drastically reduced, and large areas of pastureland were planted to food crops.

On this basis and with almost no imports of foodstuffs, the average calorie intake in the war years was reduced to 2,100 calories. On the assumption that the farm population maintained itself at a 3,000-calorie level, the nonfarm population obtained an average of only about 1,900 calories per day.

In 1944-45 the entire food-supply system was disrupted by the events of the war. The heavily populated urban center in the west was cut off entirely from the agricultural regions around it. The average ration in this section provided 660 calories per day between October 1 and April 28, 1944-45, but in the last 3 months of the period was considerably

below this level. In the south, which was liberated early in the consumption year, the urban ration provided about 1,750 calories, which probably was about equal to urban ration levels in the remainder of the country (excepting the west). The farm population, with the possible exception of those living in the areas where fighting and flooding occurred, presumably maintained their usual consumption level, particularly in view of the breakdown of transportation, which hindered the movement of crops to urban areas.

Review of 1945-46 Consumption Year

Domestic food production in 1945-46 will be sufficient to supply an average of about 1,350 calories per capita per day. This compares with an average of 2,250 calories before the war (including food produced from imported feed), and 2,100 calories in 1943-44. If the farm population is mainly provided for out of domestic supplies, the nonfarm population in the current year will have around 1,000 calories per day from domestically produced foodstuffs. Domestic production is compared with prewar in the following table:

NETHERLANDS: Production and trade in food products 1933-37, and estimated production 1945-46, by major commodity groups

Commodity	Estimated total production		Domestic production available for food		Net imports	Net exports
	1933-37 average	1945-46 prelim.	1933-37 average 1/	1945-46 prelim.	average 1933-34 to 1937-38	average 1933-34 to 1937-38
	- - - - 1,000 short tons - - - -					
Grains	1,460	1,065	545	445	735 (for food)	
Grains for food, in terms of flour	-	-	390	355	560	
Sugar, refined	250	63	250	63	70	
Potatoes	3,380	2,570	1,535	1,655		320
Meats (carcass weight) 2/	430	170	430	170	170	
Fats for food (as products)	173	93	173	93	49	
Whole milk for fluid consumption			1,160	755		4

1/ For complete prewar food balance, giving also per capita consumption, see Appendix.

2/ Includes poultry and rabbit meat.

Flooding in the winter and spring of 1945 reduced the total crop acreage by about 9 percent from the levels of 1943-44, while further reductions were caused by fighting and the laying of mine fields. The total crop acreage, however, was still somewhat higher than in prewar years. Pastures were also reduced in area by the above-mentioned causes, and since they had already been cut down during the war, were almost 20 percent below 1939 levels.

The yields per hectare of all crops in 1945-46 were substantially below those of the war years. Very limited amounts of fertilizer were available, as in all of the war years; labor was short, and transportation facilities almost nonexistent.

Under all of these circumstances, production of foodstuffs in 1945-46 fell far below the wartime and prewar levels. The output of grains, even after allowing for some underestimation of the crop, is still more than one-fourth under the prewar average, but due to the use of a larger than normal share for food, and to a higher extraction rate, the domestic bread-grain supply, in terms of flour, is only 10 percent below prewar. Sugar production is only one-third of the prewar average, and only by using a much larger proportion of the potato crop for food than is usual can potato consumption be kept at prewar levels. Without imports of feed, meat production will probably be only 40 percent of prewar levels, and fat production about 55 percent. Total milk production is still not much over 60 percent of prewar, with the amount going into fluid consumption at about the same proportionate level.

Livestock numbers in the summer of 1945 show a 30-percent increase in young female cattle over 1943 numbers, and even a slight increase over the number in 1939. Milk cow numbers, on the other hand, are still at only three-fourths of 1939 levels. Pig numbers appear to be about one-third below prewar.

Food consumption in the second half of 1945 ran at a rate of about 2,600 calories per head of the total population, or about 2,500 calories per head of the nonfarm population - a great improvement over the situation in the war years, especially 1944-45. Of average nonfarm consumption, about 2,300 calories were derived from rations, 200 calories from unrationed foodstuffs and through illegal channels. The "normal consumer" ration (excluding unrationed and illegal supplies) was raised to 2,000 calories in June 1945 and averaged 2,100 calories in the last half of 1945. The relatively favorable consumption level in late 1945 could be maintained only if imports continue large.

Outlook

There should be a very considerable improvement in all branches of agriculture in the Netherlands in the year 1946-47. Winter plantings of small grains have proceeded favorably. Present estimates are that the grain crop in 1946 will be at about prewar levels. Livestock numbers are increasing, but the increase will be limited by the limited availability of feed.

Norway

Summary

Food consumption in December 1945 was estimated at 2,500 calories per person per day (2,400 nonfarm), an improvement over the level of consumption prevailing during the war years by about 12 - 15 percent but still about 15 percent below the prewar level of 2,900 calories. If allowance is made for the use within Norway of some of the fish and whale oil from Norway's catch, domestic production in 1945-46 will be sufficient to furnish about 1,500 calories per person per day. The maintenance of December consumption levels is therefore dependent on substantial imports and withdrawals from stocks. Despite an anticipated improvement in the domestic output of livestock products, there is no prospect for materially higher food consumption levels in 1946-47 unless imports can be increased over those provided in the current season.

Prewar and Wartime Situation

Natural conditions make it impossible for Norway to be self-sufficient in foodstuffs. Before the war (1933-37) only about 43 percent of the food consumed in Norway was domestically produced. At the same time there were, however, very large exports of fish and fish products. The greatest deficiencies were in grain and sugar. Not much over 10 percent of the grain used for flour in Norway was of domestic origin, and there was no domestic sugar production. There was an apparent self-sufficiency in respect to livestock products, but imported feed contributed to a considerable extent to this production. To a total domestic fat consumption of 79,000 short tons, imported vegetable oils contributed 36,000 tons. At the same time the Norwegian whaling fleet produced some 220,000 tons of oil annually, of which the greater part was exported.

After the German occupation, a shift in production from animal to vegetal foodstuffs was encouraged. The acreage in the rotation increased by over 10 percent, mainly due to a 60-percent increase in the potato acreage. Vegetable production was greatly expanded. However, yields were not up to normal. The grain crop was below the 1933-37 average of 400,000 short tons throughout the war. In 1944 it came to only 260,000 tons. Furthermore, imports of bread grains decreased 50 percent. Potato production was on the whole one-third larger during the war than before, although that crop, too, failed in 1944. German requisitions of potatoes, meat, and fish were heavy in relation to total supplies. While there was an increase in average fish consumption, the supply, particularly of fresh fish, was very erratic. Meat practically disappeared from the diet. Some fats were imported, and the utilization of herring oil for food purposes commenced. Yet the total annual fat supply was well below 50 percent of its prewar magnitude.

In 1943-44 the average daily food intake was about 2,200 calories per person, which appeared to be an improvement over the preceding year. It has been estimated that the farm population in 1943-44 consumed about

2,500 calories per person per day, while the corresponding figure for the nonfarm population was 2,000 calories. Practically all foodstuffs were rationed, nationally or locally. During the winter of 1944-45 the food supply reached its lowest level, though shipments from Sweden for school children, etc., brought a measure of relief.

Review of 1945-46 Consumption Year

Norway's domestic food supplies are estimated to be sufficient to provide a daily per capita average of below 1,300 calories in 1945-46. This estimate, however, does not include whale-oil production by the Norwegian whaling fleet. It is well possible that whale oil for food use in Norway will contribute an additional 200 to 300 calories per person per day. In addition, Norway in 1945-46 will provide substantial quantities of whale oil and fish for other countries - a production that is not included in the above estimate of total supplies of domestically-produced foods. The higher figure of 1,800 calories per person per day from domestic sources as estimated last fall did include whale-oil output for food use in Norway and was furthermore based on the assumption that the wartime pattern of grain utilization would be adhered to - involving the use of large amounts of domestic oats and barley for food. For the present computation this assumption has been dropped, and oats and barley were included in the domestic supply of grain for food at more normal (prewar) proportions. The domestic production of different types of food in 1945-46 is compared with prewar in the accompanying table .

NORWAY: Production and trade in food products 1933-37, and estimated production 1945-46, by major commodity groups

Commodity	Estimated total production		Domestic production available for food		Net imports
	1933-37 average	1945-46 prelim.	1933-37 average 1/	1945-46 prelim.	1933-37 average
	- - - - 1,000 short tons - - - -				
Grains	400	380	46	110	405 (for food)
Grains for food, in terms of flour	-	-	31	83	294
Sugar, refined	-	-	-	-	106
Potatoes	990	1,180	375	610	-
Meats (carcass weight) 2/	119	64	119	64	2
Fats for food (as products)	3/ 42	24	42	24	4/ 36
Whole milk for fluid consumption			560	610	-

1/ For complete prewar food balance, giving also per capita consumption, see Appendix.
2/ Includes poultry.
3/ Includes 12,000 short tons of whale oil.
4/ Exports of whale oil and herring oil, possibly used for food, not included.

The Norwegian grain and potato crops were fairly good in 1945. However, less than one-fourth of the grain is bread grain. The vegetable crop has been reported very good, but the fruit crop a failure. The output of livestock products is very low. Meat production comes to scarcely more than 50 percent, and total milk production to about 70 percent of prewar output. Cheese and eggs are at a still lower level. The fat-production estimate of 24,000 tons includes herring oil, now used in the margarine industry. Available data indicate a 14-percent reduction in cow numbers between 1939 and 1945, and a somewhat larger reduction in the number of other full-grown cattle. The reduction in hog numbers is close to 50 percent, chickens 70 percent, while sheep and horses have increased somewhat. Norwegian sources estimate that it will take a couple of years to bring livestock production back to its prewar magnitude, provided sufficient feed can be obtained.

Considerable imports, especially of bread grains and fats, are needed to maintain average food consumption at the December 1945 level of 2,500 calories per person per day (2,400 for the nonfarm population). Grain products, sugar, fats, milk, and cheese continue to be rationed. Present rations of the nonfarm population average 1,800 calories daily.* In addition, some 600 calories are obtained from unrationed foods. The black market in food is assumed to provide only negligible quantities to the average consumer.

Outlook

No information is as yet available which would indicate the 1946-47 trend in food production so far as field crops are concerned. A slow improvement in the livestock output is to be anticipated. Variations in food imports may well cause greater variations in the Norwegian food consumption in 1946-47 as compared with 1945-46 than changes in domestic food output.

Denmark

Summary

The general level of food consumption in Denmark in 1945-46 is very good. It has been estimated at close to 3,000 calories per person per day, after making allowance for estimated exports of livestock products and sugar. Present consumption represents a small reduction as compared with the prewar level of perhaps 3,200 calories and is not greatly different from the average consumption during the war years. No marked shifts in production are in prospect in the 1946-47 crop year and there is no reason to assume at the present time that there will be any great change in the level of consumption.

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*) The "normal consumer" ration is 1,600 calories per day.

Prewar and Wartime Situation

Before the war, Denmark was a large exporter of livestock products. Since, however, a considerable part of these exports were produced from imported feed, and since, furthermore, butter exports in part were replaced by imports of raw materials for margarine production, the total food self-sufficiency for Denmark was only slightly above 100 percent. In respect to individual food products, there were great divergencies. Of a total domestic grain disappearance of some 4,300,000 short tons, 3,300,000 tons were domestically produced, with a sizable quantity imported for both food and feed uses. In regard to sugar, production over a period of years about equaled consumption; neither imports nor exports in individual years were significant. Of a pork production of 385,000 short tons, some 250,000 tons were exported, whereas total meat exports came to 50 percent of total meat production. Finally, 80 percent of the butter produced was exported, but imports of other fats were considerable; net fat exports came to slightly more than 50 percent of domestic production of edible fats.

During the war there were no great changes in the total production of vegetal foodstuffs, although potato production increased and wheat output fluctuated considerably. The complete elimination of feed imports, however, caused sizable reductions in livestock numbers as well as in milk yields per cow. For the year 1942 the combined index for the output of all livestock products declined to 55 percent of 1935, but improved somewhat during the following war years. There were some exports of butter, bacon, and beef even then, and exports increased when production again increased but throughout the war remained much below prewar exports.

In no year did average per capita domestic consumption fall more than some 10 percent below the prewar level. Since supplies were relatively good, there were no serious difficulties involved in assuring the food supply of the nonfarm population, and therefore no important discrepancies between the consumption levels of farm and nonfarm populations developed. The black market in food presented no problem in Denmark.

Review of 1945-46 Consumption Year

Average daily per capita food consumption in Denmark in 1945-46 has been estimated at close to 3,000 calories, derived entirely from home-grown food supplies. The difference between the average daily food consumption by farm and nonfarm population is not great, perhaps some 300 calories, with the farm population consuming about 3,200 and the nonfarm population 2,900 calories daily per capita. Grain products, sugar, and butter are the only foodstuffs rationed, although there is an informal rationing of meat. There are differential rations only for bread. Rations are fully adequate, the "normal consumer" getting 380 grams of bread, 45 grams of groats, 49 grams of sugar, and 36 grams of butter per day, although the fat and sugar rations represent sizable

cuts when compared with prewar consumption. Rationed and unrationed foods contribute about equal amounts of the average daily calorie intake.

DENMARK: Production and trade in food products 1933-37, and estimated production 1945-46, by major commodity groups

Commodity	Estimated total production		Domestic production available for food		Net imports	Net exports	Prospective exports 1/
	1933-37 average	1945-46 prelim.	1933-37 average 2/	1945-46 prelim.	1933-37 average	1933-37 average	1945-46
	- - - - 1,000 short tons - - - -						
Grains	3,700	3,945	3/ 65	604	424 (for food)		
Grains for food, in terms of flour			47	507	350		
Sugar, refined	200	185	200	185	3		54
Potatoes	1,440	1,785	400	650	-		
Meats (carcass weight) 4/	610	367	588	367		310	136
Fats for food (as products)	226	165	226	165		119	84
Whole milk for fluid consumption			715	840	-		

1/ Disregarding possible additional exports if contemplated imports of feedstuffs materialize.

2/ For complete prewar food balance, giving also per capita consumption, see Appendix.

3/ If most of total net production of wheat and rye had been used for human consumption, this figure would be 475,000 short tons. Actually, however, most domestic wheat and rye was fed and replaced by imports for milling purposes.

4/ Includes poultry.

The 1945 crop output was quite good, for grain as well as roots. Not only is the grain, potato, and sugar supply of the population assured but also the feed supply for the maintenance of a livestock industry of present proportions, providing sizable export surpluses of butter and meats. Any appreciable increase in the milk yield per cow, which still is almost 20 percent lower than before the war, will, however, not be possible until imported oilcake is again available. Present sugar rations also permit exports of this product.

The July 1945 cattle figure of 3,200,000 head is larger than the 1933-37 average and second only to the 1939 figure of 3,300,000 head. Cow numbers are also very close to their prewar level, while hogs in the fall of 1945 came to little more than one-half of their prewar numbers. Chicken numbers are at a correspondingly low level, whereas horses show a slight increase.

Outlook

There is as yet nothing that would indicate great deviations in 1946 from the 1945 crop production pattern or the level of crop output, nor are any great changes in cattle numbers or in beef production to be anticipated. A possible increase in butter production and exports would depend on two factors: the possibility of importing oilcake and the relation between the price of this oilcake and the price to be obtained for the additional butter exports. Similarly, hog numbers, bacon production, and bacon exports may increase if export prices are favorable and if corn can be imported. So far, the outlook for such increases is not favorable. The Danes have had to accept price cuts for their export products and as a consequence have had to resort to export subsidies for bacon and butter. Questions relating to export markets, as well as import possibilities for feed, are therefore likely to be chiefly responsible for the possible variations in the level of output of livestock products in Denmark in 1946-47 as compared with output during the current year.

Sweden

Summary

Average food consumption in Sweden in December 1945 stood at the very satisfactory level of about 2,800 calories per person per day. This intake is somewhat higher than food consumption at the lowest wartime level (1942) and less than 10 percent below the prewar level of about 3,000 calories. Little change is likely for 1946-47.

Prewar and Wartime Situation

The degree of food self-sufficiency in Sweden before the war was roughly 90 percent, considering feed imports in terms of their food equivalent. With respect to bread grains Sweden was largely self-sufficient, but there were sizable corn imports for feed. The Swedish self-sufficiency

in regard to sugar was close to 100 percent. While some 23,000 short tons of butter were exported annually, the use of imported oils for margarine production was twice as large, and the total production of edible fats came only to about 77 percent of total fat consumption. Of meat there was a small export surplus. This, however, is changed into a small deficit if allowance is made for the fact that some meat is produced from imported feed.

While Sweden was able to maintain some imports of food and feed during the war, the amounts involved were not large, and two exceedingly poor crop years (1940 and 1941) necessitated very careful planning of the utilization of available food and feed. According to Swedish estimates, the food consumption level in 1942 was 13 percent below that of 1939. Some improvement took place during the following years, when crops were better and livestock numbers again increasing. In the early summer of 1945 Swedish bread, fat, and meat rations were again reduced, since exports during 1944-45 of some 270,000 short tons of grain, 35,000 tons of sugar, 18,000 tons of fats, and small amounts of other foodstuffs, mainly to Finland and Norway, reduced available stocks to very low levels.

Throughout the war such important foodstuffs as milk, potatoes, and vegetables remained unrationed, and consumption of these products increased. Fish was also largely unrationed. The rationing system was highly differentiated, with a large number of consumer groups and frequent changes or substitutions in the rations. There does not appear to have been any difficulty in assuring the nonfarm population its share of food supply, and it has been stated by Swedish authorities that at no time did the amount of food that went into the black market exceed 5 percent of the products in question.

Review of 1945-46 Consumption Year

On the basis of domestically produced supplies the food-consumption level during the current consumption year (September/August 1945-46) may be calculated at about 2,800 calories per person per day. This represents a small increase in food output when compared with the average for 1933-37, when per capita consumption came to 3,000 calories daily, of which 2,700 calories were derived from home-grown supplies. The preliminary estimate for 1945-46, made in the fall of 1945, gave 3,000 calories as the possible level of consumption from domestic supplies. The reduction of this figure to 2,800 calories is mainly due to a 100,000-short-ton reduction in the amount of grain available for food because of very unfavorable weather during the harvesting season. Also, the population figure used in the earlier computation was smaller by 100,000. Imports in 1945-46 will make only a negligible contribution to total food supplies.

SWEDEN: Production and trade in food products 1933-37, and estimated production 1945-46, by major commodity groups

Commodity	Estimated total production		Domestic production available for food		Net imports	Net exports
	1933-37 average	1945-46 prelim.	1933-37 average 1/	1945-46 prelim.	1933-37 average	1933-37 average
	- - - - 1,000 short tons - - - -					
Grains	3,364	2,632	826	801	45 (for food)	
Grains for food, in terms of flour	-	-	656	600	32	
Sugar, refined	282	325	282	325	14	
Potatoes	2,076	2,088	950	1,000	-	
Meats (carcass weight) 2/	321	291	321	291		20
Fats for food (as products)	96	143	96	143	29	
Whole milk for fluid consumption			1,641	1,846	-	

1/ For complete prewar food balance, giving also per capita consumption, see Appendix.
2/ Includes poultry.

The 1945 Swedish grain crop, like the crops of the 2 preceding years, was some 20 percent below the average for 1933-37, This is true of both feed and bread grains. Yet this is a distinct improvement over the crops of the early war years, which were disastrously small. Sugar production, on the other hand, is somewhat larger than in the prewar period, and potato production roughly the same, in spite of a 10-percent increase in acreage. Meat production for 1945-46 is estimated to be about 10 percent below 1933-37 production, mainly due to a lower pork output. The striking increase in the production of edible fats is partly due to an increase in butter (to some extent gained by a reduction in the fat content of the milk consumed as fluid milk), and to a smaller extent to an increase in the production of vegetable oils, which before the war was negligible. There has been some increase in the consumption of fresh milk in Sweden during the war, and this higher level is expected to persist.

It is a striking fact that the Swedish output of livestock products in 1945-46 is very close to prewar levels. Not only are livestock numbers, with the exception of hogs, very close to the 1937 figures, but milk yields per cow are also close to prewar yields. Total cattle, which in 1937 numbered 2,986,000, were placed at 2,921,000 in September 1945. (It is estimated by Swedish authorities that they will reach 2,943,000 in September 1946.) Milk cows, numbering 1,921,000 in 1937, which now stand at 1,869,000, are expected to reach 1,889,000 later in 1946. Hogs, however, at 1,093,000 in September 1945 are still more than 300,000 below their 1937 figure, but are also expected to increase somewhat. The number of sheep, which increased during the war, appears to be on the decline.

While black-market operations with respect to meat were estimated to involve some 10,000 short tons in 1944-45, such illegal food distribution is on the whole not significant in Sweden. Rations are actually available and have been so during the war with a few minor exceptions. At present, grain products, sugar, meat, fats, cheese, and eggs are rationed. Though there have been demands for the removal of meat from the list of rationed products, it appears likely that these products, with the exception of eggs, will remain rationed through the current crop year. Rationed foods provide about two-thirds of the calorie content of total Swedish food consumption.

Outlook

Fall sowings in 1945 took place under favorable conditions, and the acreage seeded is about the same as that of the preceding year. There is no reason to expect a crop in 1946 greatly deviating from normal. Considering the expected slightly upward trend in livestock numbers, some further improvement in the output of livestock products may also be expected in 1946-47 in comparison with the current year.

Finland

Summary

Finland's food situation in 1945-46 has been little relieved by the cessation of hostilities. The cumulative decline in agricultural production and imports, initiated by the war, has continued. As compared with the prewar years 1933-37, production of milk in 1945 decreased by about 20 percent, meat and fats by 30 percent, and grain and potatoes by 40 percent. The decline in production of grains and potatoes, however, will not produce an equivalent drop in domestic food supplies, because a greater proportion of these commodities will be devoted to human needs than was the case before the war.

Steadily declining food consumption levels marked the war years, and they are remaining low because war-born shortages still prevail. Estimated average nonfarm consumption in November 1945, based on official

rations and additional supplies available from black-market and unrationed foods, provided approximately 1,800 calories per person per day. Consumption by the farm population, which constitutes almost 60 percent of the total population, is considerably higher. No significant change in the Finnish food position is anticipated in 1946-47 without increased imports of bread grains and fertilizers.

Prewar and Wartime Situation

Finnish agricultural production prior to the war covered about 80 percent of the country's food requirements. Finland imported about 25 percent of its bread grains and almost all of its sugar, and exported substantial quantities of butter and cheese and small quantities of meat. The exports of butter, however, were balanced by the importation of vegetable oils, which were primarily used for the production of margarine. The importation of concentrated feedstuffs was an important factor in the development of the dairy industry, and imported commercial fertilizer contributed to the steady increase of crop yields.

During the war years, agricultural production suffered a sharp decline. Abnormal weather conditions, smaller application of artificial fertilizers because of import difficulties, and of manure because of the reduction in livestock numbers, as well as shortages of labor and draft power, caused a decline in acreage and yields. The livestock industry was adversely affected not only by losses directly due to the war, but even more seriously by the decrease of feed-grain and hay production, and by the inability to import concentrates. The decline of the feed-grain crop resulted not only from a decrease in yields but also from decreased acreage because of the shift to bread grains. The fat situation greatly deteriorated with the decline in cattle numbers and decreased forage crops, which resulted in lower milk yields per cow.

Imports decreased greatly during the war, but Germany and the satellite countries supplied some grains, sugar, and fats , which covered a portion of Finland's food needs. In 1944-45, these smaller wartime imports, previously provided by the Axis countries, were replaced to some extent through food shipments from Sweden and the Soviet Union.

The decline in food production and imports brought in its wake lower consumption levels. By 1943-44 average consumption levels had dropped about 25 percent, from about 3,100 calories per day in the prewar period to 2,300 calories. The situation was worse in 1944-45, when Finland lost over 10 percent of her crop area in the territory ceded to the Soviet Union while retaining her entire population.

Review of 1945-46 Consumption Year

The cessation of hostilities did not reverse the downward trend of agricultural production. The production of grains for the 1945 harvest was 40 percent below prewar. Part of this decrease was due to reduced acreage, especially of feed grains, but the decline of yields was the

chief factor. Shortages of fertilizer had a very noticeable effect on yields. The 1945 potato crop showed some improvement over the previous year, but is still about 40 percent below the 1933-37 average.

FINLAND: Production and trade in food products 1933-37, and estimated production 1945-46, by major commodity groups

Commodity	Estimated total production 1933-37 average	Estimated total production 1945-46 prelim.	Domestic production available for food 1933-37 average 1/	Domestic production available for food 1945-46 prelim.	Net imports average 1933-34 to 1937-38	Net exports average 1933-34 to 1937-38
	- - - - 1,000 short tons - - - -					
Grains	1,531	895	496	405	192 2/ (for food)	
Grains for food, in terms of flour	-	-	428	344	159	
Sugar, refined	11	5	11	5	101	
Potatoes	1,435	831	713	611	3	
Meats (carcass weight) 3/	131	90	131	90		4
Fats for food (fat content)	45	31	45	31	1	
Whole milk for fluid consumption			1,091	849	-	-

1/ For prewar food balance, giving also per capita consumption, see Appendix.
2/ Includes rice.
3/ Includes poultry.

While the production of grains and potatoes has decreased substantially, the domestic supplies available for food consumption will not be as seriously affected. In order to provide greater supplies for human needs, the bread-grain acreage was expanded, and the feeding of bread grains and potatoes to livestock was prohibited. As a consequence, the domestic supply of grain for human consumption in 1945-46 was about one-fifth below prewar domestic food supplies, and potatoes about 15 percent below.

Sugar production has declined by 55 percent, but as domestic-grown sugar before the war amounted to only about 6 percent of the total consumption, this decline is not as important as the reduction of imports.

With the exception of horses and sheep, livestock numbers are below prewar. As of February 1945, all cattle had declined by 7 percent and dairy cows by 13 percent as compared with the 1933-37 average. By August 1945, hogs had dropped to about 80 percent of prewar. Milk production is estimated to be lower than in any year during the war and has dropped by more than 20 percent below the 1933-37 average. The principal reason for this decline is the reduction of milk yields brought about by shortages of fodder and feed concentrates. The hay crop was poor this year, and was 20 percent below 1944 and 35 percent below the 1933-37 average. Meat and fat production is less than 70 percent of prewar.

Rationing of food is under the jurisdiction of the Ministry of Supply, and food is sold on ration cards. The rationed population is broken down into categories, and the amount of food received depends on the type of work performed and, in the case of the farm population, on self-supplying capacity. Bread, fats, meat, milk, and sugar constitute the rationed commodities. Rations may vary from month to month, depending on the quotas delivered by producers and the imports received.

Estimated average nonfarm consumption, based on official rations in November 1945, was about 1,300 calories per person per day. With this meager diet, practically all of the nonfarm population has to supplement its ration by patronizing the black market. The black market in Finland is extensive and does a thriving business at extremely high prices. Unrationed foods, such as potatoes, vegetables, fish, etc., provide another source of food supply. These foods, as well as rationed foods, are subject to price regulations. It was roughly estimated that the nonfarm population received on the average an additional 500 calories daily from unrationed and black-market foods, which would bring the average nonfarm consumption to 1,800 calories per person per day. Consumption by the farm population, which constitutes almost 60 percent of the total population, is considerably higher.

Outlook

During 1946-47, no substantial improvement in the Finnish food situation can be expected on the basis of domestic production alone. Latest reports from Finland indicate that fall sowings for the 1946 harvest were below normal due to a wet fall. A short supply of oat seeds, and a critical fertilizer situation are also stressed. Imports of bread grains and sugar will be needed to maintain the present ration. Likewise, bread grains, fertilizers, and concentrated feedstuffs will have to be imported if an attempt is made to revert to the prewar agricultural pattern, when the natural potentialities of the country were utilized by concentration on production of feed grains and livestock products.

Switzerland

Summary

Domestic supplies for food in 1945-46 should provide a total of about 1,850 calories per day per capita of the total population. Consumption in December 1945 may be estimated at about 2,500 calories per day (2,300 for the nonfarm population). This compares with an intake of 3,150 calories in the prewar period, 1933-37, and is also below the consumption level maintained up to the middle of 1944, when imports from overseas, as well as from central and northern European countries were substantial. Yet, compared to the low point reached at the end of 1944, current consumption levels are fairly satisfactory. Prospects for an increase in consumption in the coming year depend mainly on imports.

Prewar and Wartime Situation

Before the war, Switzerland was roughly 50 percent self-sufficient in foodstuffs. While producing little more than one-fourth of the bread grain, not over 5 percent of the sugar, and half the fats consumed, it was virtually self-sufficient in meat and a net exporter of cheese and other milk products.

During the war years a notable effort to increase food production resulted in a rise of 50 percent in bread-grain production over the average for 1933-37, which, accompanied by a higher extraction rate in milling, increased by 85 percent the amount of flour available from domestic resources. Potato production increased by almost 150 percent and the production of refined sugar from domestic beets rose from 9,000 to 26,000 short tons. On the other hand, fat production dropped by one-third, the production of meat by one-half, and the output of milk by about 15 percent.

Imports on the whole provided around 30 percent of total consumption. But in the summer of 1943, with the surrender of Italy, Swiss trade routes and supply sources began to disappear. Imports of food declined from roughly 550,000 short tons in 1943 to 275,000 in 1944 and in the first half of 1945 were virtually eliminated. The average per capita food intake stood at about 2,600 calories per day in 1943, but by the end of 1944 was probably little more than 2,100 to 2,200 calories, of which imports supplied at most 10 percent.

Review of 1945-46 Consumption Year

Although production of grain and potatoes in 1945-46 fell below the level of the preceding years, output was still well above prewar averages, due to greatly expanded acreages. Sugar production was three times higher than before the war. There has not been as drastic a cut in livestock in Switzerland as in some other countries which specialize in meat and milk products and where there was a very heavy dependence on imported feeds before the war. In the spring of 1945 cattle numbers were 1,461,000, compared with 1,628,000 in the period 1933-37. The dairy cow population was reduced roughly 10 percent from 900,000 to 800,000. Young stock numbers in 1945 show no increase over earlier war years so that the

rebuilding of herds to prewar levels does not yet appear to have begun. Pig numbers increased by about 15 percent, but are still 30 percent below prewar levels.

In spite of reduced production in 1945-46, which was due mainly to adverse weather conditions, domestic resources will supply an average of 1,850 calories per capita per day to the entire population and approximately 1,450 calories to the urban population. In 1943-44 domestic production supplied, roughly, 2,100 calories daily to the total population and 1,800 to the nonfarm group. Before the war the average for the entire population was about 1,600 calories per day from domestic resources, with only some 1,100 for the urban population, assuming 3,200 calories for the farm group.

SWITZERLAND: Production and trade in food products 1933-37, and estimated production 1945-46, by major commodity groups

Commodity	Estimated total production		Domestic production available for food		Net imports	Net exports
	1933-37 average	1945-46 prelim.	1933-37 average 1/	1945-46 prelim.	average 1933-34 to 1937-38	average 1933-34 to 1937-38
	- - - - 1,000 short tons - - - -					
Grains	290	474	213	325	529 (for food)	
Grains for food, in terms of flour	150	281	150	281	380	
Sugar, refined	9	26	9	26	165	
Potatoes	809	1,797	409	1,031	-	
Meats (carcass weight) 2/	217	121	217	121	12	
Fats for food (as products)	43	34	43	34	34	
Whole milk for fluid consumption			1,141	1,075		11

1/ For complete prewar food balance, giving also per capita consumption, see Appendix.
2/ Including poultry and rabbit meat.

Food consumption in December 1945 probably stood at 2,500 calories per person per day on the average for the country as a whole, with the urban population receiving some 2,300 calories. The maintenance of this consumption to the end of the current season will largely depend on the size of imports.

Outlook

Given at least average weather in the coming season, production should improve in 1946-47. The planned acreage is still at the high wartime levels, and adequate supplies of fertilizer and agricultural machinery are at hand. The only shortage appears to be in labor, which is reported to be hard to secure at planting and harvesttime.

Czechoslovakia

Summary

With domestic production between 2,100 and 2,300 calories per person per day, Czechoslovakia in 1945-46 appears to be better supplied with food than any of its neighbors. Average per capita consumption in December 1945 was about 2,500 calories per day compared to 2,700 in prewar years - a decline by less than 10 percent. The nonfarm consumer, however, received only about 2,200 calories as against 2,450 before the war, or 10 percent less. Depending upon imports from now on, this relatively favorable level of consumption may or may not be maintained to the end of the current season.

Czechoslovakia emerged from this war with its resources relatively well preserved and an excellent chance for speedy recovery. All indications are in favor of an increased food supply from domestic resources in 1946-47 for a population smaller than in any previous year.

Prewar and Wartime Situation

Prior to the war, Czechoslovakia was 95 percent self-sufficient in food. Production was sufficient to support the population on a relatively high standard of consumption, except in fats and rice; there was also a deficit in feed grains. The country exported considerable quantities of sugar, some wheat, and brewing barley.

Upon German occupation, Czechoslovakia was broken up into a number of areas variously administered. In the so-called Protectorate and the Sudetenland, areas both agriculturally of greatest importance and under the most immediate German rule, agricultural production was pushed with great intensity. Every plot of ground had to be worked, and Germany shipped in agricultural machinery to counteract the effects of the movement of labor into the war industries. It also sent increased quantities of potash. High prices and an unlimited demand for all farm produce, coupled with distance from actual warfare till the final days of the war, kept production at a relatively high level. Diversion of feed to food uses, the lack of some fertilizers and requisitions, however, reduced livestock numbers to some extent. By 1943-44, hogs had declined 19 percent and hens 30 percent, with cattle numbers well maintained. Goats and sheep had gained in number. Though exports to Germany were considerably stepped up and food imports practically eliminated, the average inhabitant could

still eat at a rate of 2,400 calories per day. Toward the end of 1944 and during the first half of 1945 actual fighting affected food supplies in eastern Slovakia severely, while the Protectorate suffered little. Already in August, rations could be stepped up in Bohemia and Moravia, and a further increase later was foreseen.

Review of 1945-46 Consumption Year

Food production in 1945 benefited from favorable weather in the west, so that despite all the difficulties connected with liberation, and even though crop conditions in Slovakia were poor, food availability from domestic production for the average of the population should still be between 2,050 and 2,300 calories per day, compared with 2,570 before the war and 2,400 in 1943-44. This corresponds to reductions of 15 and 9 percent, respectively.

Total domestic production in 1945-46 shows an estimated reduction compared with prewar by 25 percent for grains, sugar, and fats, 20 percent for potatoes, 32 percent for whole milk for fluid consumption, and 42 percent for meats. Higher milling extraction and diversion of a larger proportion of production to food uses at home have kept the flour supply at 91 percent of prewar and raised the supply of sugar and potatoes for domestic consumption by 22 and 10 percent, respectively, above prewar consumption levels.

CZECHOSLOVAKIA: Production and trade in food products 1933-37, and estimated production 1945-46, by major commodity groups

Commodity	Estimated total production		Domestic production available for food		Net imports	Net exports
	1933-37 average	1945-46 prelim.	1933-37 average 1/	1945-46 prelim.	average 1933-34 to 1937-38	average 1933-34 to 1937-38
	- - - - 1,000 short tons - - - -					
Grains	6,400	4,853	2,981	2,152	20 (for food)	
Grains for food, in terms of flour	-	-	2,183	1,980	14	
Sugar, refined	625	474	2/ 353	2/ 430		223
Potatoes	10,692	8,488	2,425	2,680	-	-
Meats (carcass weight) 3/	545	370	545	370	17	
Fats for food (as products)	169	132	169	132	103	
Whole milk for fluid consumption			2,425	1,650	-	

1/ For complete prewar food balance, giving also per capita consumption, see Appendix.
2/ Minus exports and movements of stocks.
3/ Including poultry and rabbit meat.

Thus starchy foods are in good supply, and some of the sugar (over 40,000 short tons) and potatoes are said to be available for export. In contrast, all animal products have experienced considerable declines in line with the decline of livestock populations, which are now estimated to have been reduced to 75 percent of prewar in the case of cattle, 60 percent for pigs, and 50 percent for poultry. Still, roughly one-fourth of the average Czechoslovak diet at present consists of animal products (one-third in prewar days).

Since December 10, 1945, when rationing was introduced in Slovakia, the whole of Czechoslovakia has been on a roughly uniform basis of urban rationing. "Normal consumers" receive about 1,550 calories per day, very heavy workers 2,560 calories, and miners about 300 calories more than the latter. The average nonfarm ration for the Czechoslovak population is 1,900 calories, while the German part of the population - unless their loyalty to Czechoslovakia is proved - receive only 1,250 calories per "normal consumer." Unrationed foods, such as fruits and vegetables, some fish and game, and food illegally acquired, are reported to account for 300 - 500 additional calories per person. Therefore, total nonfarm consumption for the Czech population (excluding the Germans) in December 1945 amounted to about 2,200 calories. Transportation difficulties, which hampered an equitable distribution of foodstuffs throughout the country, are being rapidly eliminated. Trucks have been supplied by the United States Army and UNRRA.

Outlook

The outlook for the coming crop is rather bright. Though the acreage planted will be below prewar or wartime peaks (because of lack in manpower, resettlement of the former Sudetenland, and shortage of draft power in certain areas), all vegetal foods should be plentiful for a population only about four-fifths of its prewar size.* The output of livestock products will lag somewhat during the 1946-47 consumption year while the animal populations are being reconstituted.

Poland

Summary

Latest information indicates that domestic production of food in 1945-46 in the territory at present under Polish administration may be less than two-thirds of the prewar output in the territory of prewar Poland. Domestic supplies left for local consumption are short, even though the 1945-46 territory has only about two-thirds of the population of prewar Poland. Estimates available do not seem to be sufficiently

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*) The indicated reduction is mainly due to expulsion of the resident German population, notably of the Sudeten areas, and of the Hungarian population in Slovakia. A smaller number of Slovaks will be repatriated from Hungary.

reliable for a quantitative evaluation of production, and takings by the army of occupation are unknown, but it is probable that, while the farm population is not too abundantly supplied, the population in many urban and rural deficit areas is actually very short of food. Consumption by this population group in the first half of 1946 will in part depend on supplies to be furnished by UNRRA.

Due to a number of factors, the outlook for the coming crop is not encouraging. Even for minimum dietary standards, Poland will probably remain dependent on food imports in 1946-47.

Prewar and Wartime Situation

Prewar Poland was one of the important agricultural surplus-producing countries in Europe. It exported about 900,000 short tons of grain and considerable quantities of sugar, potatoes, and dry legumes, as well as all kinds of animal produce. Net exports amounted to a food equivalent of about 200 calories per person per day.

The war brought in its early days destruction and partition. Polish farmers were driven from the western areas to make room for German settlers. Also the Germans were more intent on obtaining forced deliveries of food through extortion, regardless of the needs of the Polish population, than through maximization of production. Again in the last year of the war, battles raged over most of the Polish territory, with occupying forces taking livestock and other supplies, leaving the country as thoroughly damaged as any in Europe.

Situation in 1945-46

The territory now under Polish administration excludes the relatively low-producing eastern areas of prewar Poland but includes the somewhat smaller but better developed area to the east of Germany's Oder-Neisse line. Having lost one-third of its population, the present Polish territory has more and better cultivable land per inhabitant than prewar Poland had. But much of the area between the Oder and Poland's prewar western frontier is reported to be so devastated and so stripped of all movable equipment and supplies that the $1\frac{1}{2}$ - 2 million Poles now in that region must depend at least in part on supplies from the remaining area of the former Poland. In the latter part, production is estimated at less than one-half of prewar in all crops and even less in animal produce. Milk cows are said to be down to 44 percent, horses to 30 percent, pigs to 26 percent, and sheep to 10 percent of prewar numbers.

A paralyzed transport system, economic insecurity, and the burden of an army of occupation make it appear probable that domestic supplies of food actually available in urban and deficit rural areas are very short. Moreover, about seven-eights of domestic food supplies are starchy foods, with very little fat and animal products available. The Government has a system of pooling a part of the farm crop, for which the producer is paid a low price. To compensate him, the farmer is permitted to sell the

remaining surplus from his production on the free market at inflated prices. Collections, though, are not satisfactory. There is no general rationing system, but Government workers and special groups, such as miners, are provided with food. Under present conditions, only the rich or otherwise privileged can afford an adequate diet. UNRRA supplies, though, are expected to alleviate the situation somewhat in the near future.

Outlook

Crop prospects for the coming harvest are poor, and there is no likelihood of a speedy recovery in livestock production. Fall planting has been disappointing, according to statements by the Minister of Agriculture, and the shortage of draft power and equipment will not permit compensation in spring planting. Manpower is also short in the German area, from which the resident population is being expelled. The drastic changes in the system of land tenure made in areas where large estates prevailed, reducing farms to sizes too small for efficient operation, will add to the difficulties of production, even though cooperative farming of larger tracts of land may alleviate some of the worst economic effects of these measures.

Poland will probably remain dependent on some imports of food to maintain even a minimum dietary standard in 1946-47.

Austria

Summary

December 1945 levels of consumption in Austria were probably below 2,000 calories per head of the total population (below 1,800 for the nonfarm population) - a decline by almost one-third against prewar consumption of 2,850 calories, and about 20 percent compared to 1943-44. The burden of the decline falls heaviest on the nonfarm consumer. The prospect of agricultural production for Austria in the coming season (1946-47) is not bright, and output may not show much improvement over that of the past year, which was the worst since the founding of the Austrian republic.

Prewar and Wartime Situation

Through strenuous efforts, Austria, in the middle thirties, had attained what was for that country a high degree of food self-sufficiency, with 75 percent of total consumption covered by domestic production. The country produced 70 percent of its food grains, 100 percent of its sugar, 82 percent of its meat, and 75 percent of its fat requirements. To some extent, however, meat and fat output was based upon imported feed supplies.

After the annexation of Austria, the German agricultural program called for maximum production. High yielding crops, such as potatoes,

sugar beets, feed beets, and especially oilseeds (chiefly rape), were fostered at the expense of feed grains. Although expansion in acreage of these crops was moderately successful, yields of all crops declined, partly because of unfavorable weather, but even more owing to the progressive scarcity of factors of production. In 1943 and 1944 the output of potatoes, sugar beets, and grains was considerably (about 20 percent) below the prewar average (1933-37). Acreages of both feed grains and bread grains had been significantly reduced. Vegetable production was up, but the increase was more than offset by a drastic decline in fruit output. The greatly curtailed import of feedstuffs and the diversion of grain from feed to food use forced a reduction in livestock numbers, particularly hogs and poultry. By 1943-44 meat and egg output had declined by 25 percent (pork alone by about 40 percent) and slaughter fat by over 50 percent compared to the 1933-37 average. Milk production was down by 12 percent.

In order to supplement the diet of the Austrian population, which had gained about a million in number through the influx of foreign labor and German evacuees, Germany diverted to Austria substantial quantities of grains, fats, sugar, and potatoes. As a result, food consumption up to the last year of the war remained at a relatively satisfactory level. Per capita food intake stood at about 2,450 calories per day in 1943-44, against 2,850 in prewar days. A drastic reduction was decreed in the early spring of 1945, when total food allowances were about 1,900 calories per head of the nonfarm population (including unrationed and illegal consumption) reaching almost the lowest levels of World War I.

Review of 1945-46 Consumption Year

Domestic food production in 1945-46 has been reduced to between 1,100 and 1,300 calories per head of the total population. This compares with a prewar production of 2,150 calories per capita for a population somewhat smaller than it is now. The decline in total output of food, compared to prewar, would thus appear to have been about 40 percent.

Present estimates show that gross production of the major food groups declined by about 50 percent compared to prewar. This sharp decline is due to the effects of open warfare and occupation and unfavorable weather in the richest agricultural districts of the country, as well as the cumulative effects of wartime shortages. Bread grains in terms of flour are down by only one-third (total grains one-half) due to diversions from feed to food and higher milling rates. A similar diversion has kept potato consumption at prewar levels, despite a decline in total production by almost 50 percent. Sugar production, though, has declined 90 percent. Supplies of vegetables are slightly above, of fruits considerably below the prewar quantities. Output of all livestock products is estimated at about 50 percent of prewar, although latest livestock estimates allow a more optimistic view. In case food imports are insufficient this winter, a further reduction in livestock numbers and a corresponding increase in meat production must be expected.

AUSTRIA: Production and trade in food products 1933-37, and estimated production 1945-46, by major commodity groups

Commodity	Estimated total production		Domestic production available for food		Net imports	Net exports
	1933-37 average	1945-46 prelim.	1933-37 average 1/	1945-46 prelim.	average 1933-34 to 1937-38	average 1933-34 to 1937-38
	- - - - 1,000 short tons - - - -					
Grains	2,100	1,075	-	-	379 (for food)	
Grains for food, in terms of flour			665	439	292	
Sugar, refined	176	18	176	18	2	
Potatoes	2,972	1,523	646	628	15	
Meats (carcass weight) 2/	344	161	344	161	77	
Fats for food (as products)	86	47	86	47	29	
Whole milk for fluid consumption			1,543	732		33

1/ For complete prewar food balance, giving per capita consumption, see Appendix.
2/ Includes poultry and rabbit meat.

The zonal partition of Austria makes food distribution difficult and unequal among zones. The breakdown of transport facilities and the presence of large numbers of displaced persons and large numbers of refugees, notably German nationals from Czechoslovakia, Hungary, and Yugoslavia, add to the difficulties. Requisitions by the Russian and, to a lesser extent, the French armies also constituted an important drain on local supplies. Approximately uniform food distribution, at least of total calories, has been achieved only in Vienna.

Beginning with March 1, UNRRA will assume full responsibility for Austrian food relief and is expected to eliminate inequalities among zones. How great the inequality is can be seen from a comparison of normal consumers' rations, received by 40 to 50 percent of the nonfarm population, in the four zones in terms of calories per day (October 1945): Russian zone 800, United States 1,490, British 1,425, French 1,445, and Vienna 1,550. Heavy workers obtain 1,165 calories per day in the Russian, 2,725 in the United States, 2,410 in the British, 2,190 in the French zone, and 3,000 in Vienna.

In these circumstances it is extremely difficult to estimate present average food consumption for the country as a whole. Rations are not always fully available. In December 1945 consumers in Vienna may have averaged 1,700 calories from rations plus 100 calories from unrationed and black-market foodstuffs. Nonfarm consumers in the United States, British, and French zones may have averaged 1,600 calories from rations, plus 100 to 200 calories from unrationed and illegal supplies. In the Russian zone, on the other hand, total nonfarm supplies may not have exceeded 1,000 calories from rations, plus perhaps from 400 to 500 calories outside the ration. Thus the situation in the Russian zone seems particularly critical. Food riots have already been reported from some industrial centers such as Wiener Neustadt.

For the country as a whole a total present food intake not exceeding 1,800 calories for the nonfarm population or about 60 percent of the prewar level seems to be indicated. Even this low level cannot be sustained unless substantial imports are made in the coming months.

Outlook

The cumulative decline in soil fertility, lack of fertilizer, and the great loss of horses and therefore draft power, as well as equipment, in the Russian zone make it unlikely that domestic production in Austria will show much improvement in 1946-47. A measurable proportion of the land in Lower Austria and Burgenland, the richest districts, was not sown last fall, and it is unlikely that spring sowings will make up for the loss. Some categories of livestock may experience further declines.

Germany

Summary

In the occupation zones of the Western Allies supplies of food from domestic sources in the consumption year 1945-46 should average 1,500 calories per person per day (1,100 for the nonfarm population). December 1945 consumption levels in these zones were probably not above 1,750 calories for the average of the nonfarm population. This level cannot be maintained for the remainder of the consumption year unless imports prove much larger than now envisioned. Before the war the nonfarm population of the area consumed about 2,700 calories per person per day. The outlook for domestic production in the 1946-47 consumption year is for little, if any, increase.

Prewar and Wartime Situation

While all of Germany within its 1937 frontiers before the war produced about 83 percent of its total food needs, the area west of the Oder-Neisse line now occupied by the forces of the United Kingdom, the Soviet Union, France, and the United States had an output of less than 75 percent of total requirements. This area had a deficit of somewhat over 1,000,000 short tons each of bread grains, feed grains, and potatoes, 200,000 tons

of sugar, 800,000 tons of edible fats and oils, 350,000 tons of meat, 150,000 tons of eggs, and 1,500,000 tons of oilseeds. The feed grains and the cake equivalent of the oilseeds brought into the area may be estimated as having produced 200,000 tons of meat, 50,000 tons of slaughter fats, and 2,500,000 tons of milk. The area's production, therefore, covered only from 80 to 85 percent of its total bread needs, 90 percent of food-potato requirements, and 80 to 85 percent of its sugar requirements; its apparent self-sufficiency in meat was 90 percent, but only 80 percent if feed imports are considered. Similarly, fat production was 50 (40) percent of requirements.

During the war years, domestic food output showed a gradual decline, but substantial imports into the area of grain, fats, meat, and sugar maintained consumption at a reasonably satisfactory level. In 1943-44 total civilian consumption still stood at 2,450 calories per person per day. The rapid deterioration of the military situation in 1944-45, which entailed a great reduction in German takings from other countries, resulted in a substantial decline in the food intake, especially from March 1945 onward.

Until early in 1945, farm controls continued to function well, and distribution of available supplies was reasonably equitable as among the various urban population groups. The black market remained unimportant. Nonfarm consumption in 1943-44 was estimated at an average of 2,250 calories, farm consumption at 3,300, with the average at 2,450 calories, as indicated. The "normal consumer" intake at that time was over 2,000 calories per day. By March 1945 average consumption by the nonfarm population was reduced to 1,900 calories and that of the "normal consumer" to 1,600 calories per day.

Review of 1945-46 Consumption Year

Domestic output of food in the occupation zones of the Western Allies during the present consumption year may at best be estimated at 1,500 calories per person per day, or about 1,100 calories for the average of the nonfarm population. This is a production of ultimate food energy only 5 to 10 percent below that of prewar years in this area. The decline is fully accounted for by the elimination of that part of food production which in prewar years was based on imported feed supplies not now available. With total agricultural production in the zones of the Western Allies in 1945-46 around one-fourth below the prewar level, the maintenance of the output of ultimate food energy at from 90 to 95 percent of prewar is explained by the large-scale shift in the utilization of total supplies from feed to direct food uses, especially through higher flour extraction and the admixture of barley flour in bread-making.

Total crop production in the Soviet occupation zone in 1945 may be estimated at less than 70 percent of the prewar average. Compared to 1944, total crop output in all four zones taken together may have declined little more than 10 percent, with reductions smallest in the American zone and largest in that part of the Russian zone that lies east

of the Elbe river. In this latter area there was a moderate decline only in the case of the bread-grain crop, most of which was sown in the fall of 1944; all spring-sown crops, including sugar beets, oilseeds, and the all-important potatoes, suffered great losses in both acreages and yields.

No final figures on present livestock numbers are yet available for the four occupation zones. Indications are, however, that cow numbers are down by perhaps 20 percent, hogs by about 60 percent, compared to prewar. Losses have been greatest in the Soviet and French zones, and smallest in the American zone, where the decline in cow numbers was only slight, in all cattle about 5 percent, and in hogs about 50 percent. The loss of horses in the Soviet zone east of the Elbe is reported to have been about two-thirds of prewar numbers. There was also a considerable decline in the French zone, while the declines in the British and American zones were much smaller.

As a result of these developments, the output of livestock products in the four zones in 1945-46 runs much below prewar. Meat production may be only 40 percent of the prewar average, milk production perhaps 60 percent. Milk yields per cow have further declined.

Imports now under consideration are likely to fall far short of minimum requirements deemed necessary to prevent serious disease and unrest. Even though farm controls have not deteriorated nearly as much as had been expected, domestic supplies left for the nonfarm population are sorely inadequate. The food situation and outlook in the zones of the Western Allies have been viewed with grave concern by a Combined Nutrition Committee, composed of United States, United Kingdom, and French experts, who made repeated surveys of conditions. The Committee as far back as August 1945 indicated that an immediate increase in the urban "normal consumer" ration to 1,550 calories is of paramount importance, not only because of nutritional considerations, but also in view of the serious shortage of fuel and inadequate shelter. It was further recommended that this ration be raised to 1,700 calories in the worst areas not later than January 1, 1946.

Until November 1945, normal consumer rations in all four zones remained below the 1,550 calories believed by the Committee insufficient for the maintenance of health for more than a few months. The rations were highest in the British zone, followed by those in the American zone, but were considerably smaller in the French and Russian zones (800 to 1,200 calories). These rations, moreover, were not always honored, especially in the French and Soviet zones. In no zone was it possible to attain equitable distribution, and rations by products varied greatly as among periods and localities due to transport and storage difficulties.

Beginning with November, urban rations in the British zone almost reached the target of 1,550 calories for the "normal consumer;" in the American zone the normal consumer ration was 1,500 calories, but still ranged only from 750 to 1,200 calories in the Soviet zone. The normal consumer ration in the French zone still seemed to stand at around 1,200 calories. Depending upon the weight distribution of other consumer

categories, the average urban ration for all consumers in December 1945 has been estimated at 1,200 calories in the Russian zone and 1,600 calories in the American zone. Unrationed and black-market foodstuffs are said to add greatly varying amounts of energy to the rationed intake, ranging from zero for many to 1,000 calories for a few people, and averaging perhaps 300 to 400 calories in the Russian and 200 in the American zone.

It should be noted that, on the basis of available statistics, it would appear unlikely that rations for the remainder of the consumption year could be maintained at December 1945 levels unless imports were to be much larger than now envisioned. If rations must be reduced even from the present low levels, the situation in Germany, already characterized by a conspicuous rise in death rates, especially infant mortality, and in the incidence of epidemics, may abruptly take an alarming turn.

Outlook

Prospects for 1946 crop production vary but are not very promising anywhere. The American zone is satisfactorily provided with both draft and animal power, but supplies of commercial fertilizer, spare parts, and new machinery are quite inadequate. There is also a scarcity of several types of seed, including seed potatoes. An exchange of food potatoes for seed potatoes with the British zone is being arranged.

In the British and French zones as well, commercial nitrogen and phosphates will be practically unavailable and the supply of spare parts and new machinery very short. The British zone, as the American, is sufficiently provided with both man and draft power.

The Russian zone may be reasonably well supplied with commercial nitrogen (about 60 percent of the 1938-39 level) and, in areas adjacent to the mines, with all the potash needed by the producers. However, there will be practically no phosphates. The large estates, which were subdivided into small plots - plots indeed too small for efficient operation - for the time being may continue to be run as large farms on a cooperative basis. In such circumstances the principal effect of the land reform may be a large decline in market deliveries, although the standard of production also will deteriorate. If draft power in the Russian zone is not much above 25 percent, as has been reported, such shortage will be the decisive production factor in that zone in the near future.

Italy

Summary

Italy is now faced with the worst food situation of her recent history. During the consumption year 1945-46 the per capita calorie intake appears considerably below the 2,200 to 2,300 calories consumed in the war years up to 1943 and a peacetime (1933-37) average of 2,550. December 1945 levels of total food consumption by the nonfarm population do not seem to

have exceeded an average of 1,550 calories per person per day. Even this low intake will have to be reduced unless substantial imports are made.

On the basis of official estimates checked and accepted by the Allied Commission, domestic food production for the consumption year 1945-46 is less than 60 percent of the prewar average. Even if this figure were to overstate the decline in food output, there is no doubt that the decline in production was exceptionally large, as a result of one of the worst droughts of the past century and of the effects of war damage to the production plant.

Since considerable recovery in the domestic food output for 1946-47 can reasonably be expected, and with food imports remaining at current levels, the average per capita calorie supply in the next consumption year will be larger.

Prewar and Wartime Situation

The program of increasing food self-sufficiency which was in effect prior to the war had reduced Italy's net imports of foods to about 8 percent of the nation's calorie intake. Net imports of grains represented but 5 percent of the total supply, while the degree of self-sufficiency for meats and edible fats was 90 and 85 percent, respectively. Sugar imports were negligible.

During the war years 1940 and 1941, domestic food production was maintained at about the prewar average. The first signs of war weariness became evident in 1942, when both production and consumption of food took a decided turn for the worse. It is estimated that in 1943, as a result of military operations and of a severe drought in the southern regions, the average calorie intake fell to about 2,000 calories per day. During the consumption year 1944-45, virtually the entire country suffered from war-caused dislocations, food consumption falling to an average of 1,900 calories per day.

The lack of fully effective distribution controls have long represented Italy's major food-management problem. The system of compulsory pooling of staple foodstuffs - first adopted in 1936 as a price-sustaining measure for wheat and gradually extended to all grains, pulses, and edible fats - allowed some 12 million self-suppliers to retain food sufficient to insure that portion of the population normal levels of food consumption, notwithstanding any decline in food output. Thus, short crops involved greater percentage reductions in the supplies available to the ration-card holders. For instance, a 6-percent decline in grain production from 1941 to 1942 was attended by a 13-percent decline in collections by Government pools. Moreover, a system of nation-wide rations existed only for grain products, edible fats, and sugar, while legumes, most animal products, and potatoes were rationed locally on the basis of available supplies. Local rations varied widely from section to section and from time to time. At no time did the Fascist Government attempt to integrate local and nation-wide rations in a system that would equalize food supplies throughout the country.

As a result of the indicated difficulties and distribution inequalities, consumption by ration-card holders in 1943-44 and 1944-45 was probably no more than 1,750 and 1,700 calories, respectively, with nation-wide rations for "normal consumers" of less than 900 calories per day. Thus the importance to the nonproducing population of supplies obtained from the black market and of unrationed foodstuffs was considerable. In 1943-44 and 1944-45 such supplies may have amounted to an average of around 800 calories per day.

Review of 1945-46 Consumption Year

Revised estimates of 1945-46 production for food, including allowances for newly issued data on grain and sugar production, place the daily per capita supply from domestic sources at less than 1,300 calories, as compared with 2,350 calories in 1933-37.

Reduced acreage, adverse weather, and fertilizer shortages curtailed grain production for food to 53 percent of the prewar average. With an 80-percent decline in acreage and much of the beet crop unsuitable for processing, the sugar output is reported to have fallen to some 6 percent of prewar. The potato crop is less than 60 percent of prewar. Olive oil output, now placed at 100,000 short tons, is the lowest in many years. Livestock numbers, which had increased steadily up to 1942, by now have been sharply curtailed from prewar levels, cattle and equine animals by 25 percent, sheep and goats by 20 percent, hogs by 15 percent.

ITALY: Production and trade in food products 1933-37, and estimated production 1945-46, by major commodity groups

Commodity	Estimated total production		Domestic production available for food		Net imports	Net exports
	1933-37 average	1945-46 prelim.	1933-37 average 1/	1945-46 prelim.	average 1933-34 to 1937-38	average 1933-34 to 1937-38
	- - - - 1,000 short tons - - - -					
Grains	12,971	7,320	9,608	5,070	2/ 292 (for food)	
Grains for food, in terms of flour	-	-	7,768	4,370	267	
Sugar, refined	326	18	326	18	4	
Potatoes	3,074	1,764	1,811	882		47
Meats (carcass weight) 3/	888	592	888	592	68	
Fats for food (as products)	477	217	477	217	51	
Whole milk for fluid consumption			1,714	1,213	-	-

1/ For complete prewar food balance, giving also per capita consumption, see Appendix.
2/ Includes rice.
3/ Includes poultry and rabbit meat.

Food import requirements are very large, due to the decline in production and inadequate distribution controls. Of the 4,200,000 tons of wheat needed to maintain the ration throughout the consumption year, the equivalent of only 1,300,000 tons of wheat were available through government pools, while about 1,000,000 tons of grains may have entered illegal channels. Controlled supplies of fats in the 1945-46 consumption year are expected to yield but 46,000 tons against a total ration requirement of over 115,000 tons.

"Formal consumer" rations in December 1945 furnished only 820 calories per person per day, the weighted average ration 940 calories. Food supplies outside the ration are not likely to contribute as much as 600 calories per day, so that present average nonfarm consumption does not seem to exceed 1,550 calories. Even this low level could not be maintained for the remainder of the consumption year unless imports are substantial.

The plight of the urban consumer is further illustrated by considering the position of Rome with regard to certain animal products. In this city, where the food supply is of special concern to the Italian and Allied authorities, meat consumption in 1945 was but one-seventh of normal. Over the same period controlled milk supplies were only 20 percent of normal and were even smaller than for the corresponding period in 1944, when the effect of milk shortages, the steadily increasing rate of infant mortality, created much concern to the Allied authorities.

Outlook

Food production in 1946-47 should be considerably above the levels reached in 1945-46. This expectation is based on (a) reports of favorable weather during the fall planting season and a larger wheat acreage sown as well as the assumption that the disastrous drought conditions of 1945 will not recur in 1946; (b) increased supplies of both nitrogenous and phosphatic fertilizer; (c) distribution to farmers of both domestic and imported tractors.

Among the elements that militate against much higher food production are the growing unrest in rural areas due to rising living costs and the deepening of the food crisis. Despite the imports of tractors, a shortage of draft power will continue.

Definite improvements are expected in the supply of both sugar and of olive oil, as well as in the yield of grains. Shortages of concentrates will continue to interfere with the rehabilitation of herds and flocks.

Spain

Summary

The food situation in Spain deteriorated in the last half of 1945 and will probably become still more difficult in the first half of 1946. Domestic food supplies are unusually short, and imports during the current consumption year may not raise total supplies in 1945-46 to as much as 1,900 calories per person per day. This level is considerably lower than that prevailing in the past 2 years and less than three-fourths of the pre-Civil War average of 2,650 calories. Since a drought as severe as that of 1945 is unlikely to recur in the coming spring and summer, crop production in 1946 will probably show a substantial recovery, with a consequent easing of the food situation, provided that imports are maintained at the level of recent years.

Pre-Spanish Civil War and Wartime Situation

Before the Civil War, Spain was about self-sufficient on a diet which compared unfavorably with those of most Western European countries. Domestic output satisfied requirements of wheat in years of good crops, of sugar, and livestock products, which were produced almost wholly with domestic feed. There was a deficit in legumes, eggs, and fish. At the same time, Spain had an export surplus of olive oil, fruits, vegetables, nuts, wine, rice, and potatoes.

During the Civil War, the sown area showed a marked decrease, and recent years have apparently brought little recovery. According to official sources, acreages under the four main small grains and corn amounted to 6,900,000 hectares (17,000,000 acres) in 1943, as compared with 6,300,000 (15,600,000) in 1940 and 8,200,000 (20,300,000) on the average in 1931-35. At the same time, sheep and goats, the chief competitors of grain for use of the land, seem to have multiplied strongly.

Not only crop acreages, but also yields have been reported at levels well below the pre-Civil War average. While part of the reported decrease is no doubt statistical in nature, there is little question but that food production was much smaller than before the war. Spain became heavily dependent on outside sources for food. Considerable amounts of wheat and some other foodstuffs were imported, while exports were largely confined to oranges and wine. Total supplies, however, probably provided no more than 2,300 calories per person per day even in a good year such as 1944-45.

The burden of the reduction in food supplies was very unequally distributed. In Spain, as in a number of countries, ineffective controls and transportation difficulties prevented efficient collection and equitable distribution of food. Producers were reluctant to restrict their utilization of home-grown produce and deliver the surplus to the authorities at prices far lower than those prevailing in the black market.

Leaks in the official channels of distribution occurred all along the line from producers to consumers, further reducing supplies for distribution against ration cards. Stated rations, which were not always fully available, provided something under 1,200 calories daily on the average for the various urban consumer categories in 1944-45. Unrationed foods, which by that time included livestock products as well as fruits and vegetables, plus food obtained illegally probably raised urban consumption to some 2,000 calories per person per day.

Review of the 1945-46 Consumption Year

Spain suffered severely from drought during the last growing season. While a fair amount of rain was received in the autumn of 1944, the total for the following winter, spring, and summer in Madrid was below 6 inches, or less than in the corresponding period of any year for decades. As a result, crop output fell to low levels. Even allowing for some underestimation by official figures, food production in 1945-46 is estimated at less than 70 percent of the average for 1931-35, providing around 1,600 calories per person per day for a population which is over 10 percent larger than before the Civil War.

SPAIN (excluding Canary Islands): Production and trade in food products 1931-35, and estimated production 1945-46, by major commodity groups 1/

Commodity	Estimated total production		Domestic production available for food		Net imports	Net exports
	1931-35 average	1945-46 prelim.	1931-35 average 2/	1945-46 prelim.	average 1931-32 to 1935-36	average 1931-32 to 1935-36
	- - - - 1,000 short tons - - - -					
Grains	9,938	4,920	4,895	2,700	3/ 20 (for food)	
Grains for food, in terms of flour			3,770	4/ 2,430	15	
Sugar, refined	330	140	330	140	5/	
Potatoes 6/	5,363	4,080	2,575	1,985		94
Meats (carcass weight) 7/	680	555	680	555	5/	
Fats for food (as products)	460	290	460	290		66
Whole milk for fluid consumption			1,625	1,050	1	

1/ Some allowance has been made for underestimation of 1945-46 output by official figures. 2/ For complete prewar food balance, giving also per capita consumption, see Appendix. 3/ Includes rice in terms of milled. 4/ Assuming a flour extraction rate of 95 percent for wheat and rye. 5/ Less than 500 short tons. 6/ Includes sweet potatoes. 7/ Includes poultry. 8/ Includes processed milk in terms of fresh.

Recent reports have necessitated a downward revision of the October estimates of 1945-46 food production. Compared to the pre-Civil War average, wheat production appears to be down by more than one-half and barley and oats production by more than three-fifths. Rice and, according to unofficial Spanish estimates, rye and corn made a much better showing. Sugar production remains abnormally low. Output of potatoes and especially legumes is smaller than last year and well below the average for 1931-35. Olive oil from the 1945 olive crop is now expected to fall short even of the low 1944-45 level. Shortage of feedstuffs and prematurely dried-up pastures have brought the expected decline in livestock numbers. As of October 1945, sheep and goat numbers were apparently still above pre-Civil War levels, but cattle and hog numbers were reported at 90 and 91 percent, respectively, of the year-end estimate for 1934.

In view of the prospective short grain supplies, bread rations were reduced in the summer, low-income consumers being entitled to 150 grams of bread per day as against 230 grams earlier in the year, and barley, corn, and manioc are at present being admixed with bread flour. Legal weighted average rations for the urban population in November 1945 probably provided little if any more than 900 calories per day. Since supplies of unrationed and black-marketed food no doubt have also been reduced, as compared with 1944-45, the total intake of the urban population at present may be estimated at a daily average of around 1,500 calories per capita. This level cannot be maintained unless substantial imports are forthcoming in the first half of 1946.

Outlook

The long drought in Spain was broken in the autumn of 1945, which brought abundant rains. Fall-sown grains are reported to be in good condition. Provided that weather conditions are not unfavorable during the remainder of the growing and harvesting season, 1946 crop production should show a substantial increase over that of 1945, though, unless acreage is larger, there is little likelihood that output will approach pre-Civil War levels.

Portugal

Summary

With domestic production sharply curtailed by adverse weather and imports falling short of requirements, Portugal's food consumption in 1945-46 will probably be somewhat lower than during the war. December 1945 consumption was probably below 90 percent of the prewar levels. Unless rainfall is as deficient in the spring of 1946 as last year, maintenance of imports at current levels would make it possible to improve food consumption in 1946-47.

Prewar and Wartime Situation

In 1929, under a newly established corporate regime, Portugal began to expand domestic food production and to reduce food imports. However, the wide fluctuations in the domestic wheat crop, as affected by weather conditions, and the cyclical variations in the olive-oil output, together with inadequate provisions for storage of surplus crops, greatly limited the effectiveness of Government planning. Over the period 1933-37, food imports represented about 8 percent of the estimated consumption. The degree of self-sufficiency was about 90 percent for grains and 100 percent for food fats. The country was self-sufficient with regard to meat and wholly dependent upon imports for sugar.

During the war years, domestic food production and imports remained at or above prewar levels up to 1942. Since 1943 a series of drought years has played havoc with the output of small grains and pulses, though total food supplies in 1943-44 were estimated at 95 percent of prewar, owing to increased imports. There is no evidence of significant declines from this level for 1944-45.

Inadequate distribution controls made the ration-card holders bear the full impact of the declines in total supplies. Of the domestically produced grains, only wheat and rice, plus negligible amounts of corn and rye, are taken into account in appraising urban food supplies. Of the wheat crop, which is mostly produced south of the Tagus River and varies greatly from year to year, a fixed amount (namely 193,000 short tons) is left to the producers. Thus domestic supplies of wheat available to meet rations have ranged from 386,000 short tons (viz., 80 percent of total requirements) in 1942-43 to 132,000 short tons in 1943-44.

Review of 1945-46 Consumption Year

Domestic production of food in 1945-46 is estimated to yield 83 percent of the prewar average which, on a per capita basis, because of the increase in population, is 1,400 calories per day or about 71 percent of prewar. A severe drought, lasting throughout the spring and summer, curtailed the yield of rain-grown crops; shortage of irrigation water reduced the output of corn, vegetables, and rice. Wheat production is now reported at 314,000 short tons as compared with 520,000 in 1933-37, 259,000 tons in the disastrous year 1936, and a wartime peak of 578,000 tons in 1942. Domestic supplies of grains for food are estimated at only 74 percent of the prewar average. Only in the case of potatoes is production somewhat larger than in prewar years, because the acreage has been more than doubled. After 3 years of short feed supply, the livestock population has been reduced below prewar levels.

Again, with producers' permitted retentions unchanged, only ration-card holders were affected by the decline in production. Thus, out of a domestic output for food of 647,000 short tons of all grains (excluding rice) only 120,000 tons were available to the official distribution agencies to cover rations, which require a total of 452,000 tons of wheat equivalent.

CONTINENTAL PORTUGAL: Production and trade in food products 1933-37, and estimated production 1945-46, by major commodity groups

Commodity	Estimated total production		Domestic production available for food		Net imports	Net exports
	1933-37 average	1945-46 prelim.	1933-37 average 1/	1945-46 prelim.	average 1933-34 to 1937-38	average 1933-34 to 1937-38
	- - - - 1,000 short tons - - - -					
Grains	1,199	926	930	688	95 (for food)	
Grains for food, in terms of flour	-	-	777	604	72	
Sugar, refined	-	-	-	-	73	
Potatoes	617	882	543	661	9	
Meats (carcass weight) 2/	154	140	154	140		1
Fats for food (as products)	93	88	93	88	-	
Whole milk for fluid consumption			54	44	-	

1/ For complete prewar food balance, giving also per capita consumption, see Appendix.
2/ Includes poultry and rabbit meat.

In November 1945 the Lisbon consumer received some 1,280 calories per day from rationed foodstuffs. As compared to prewar consumption levels, the main reduction was in grain products, while consumption of sugar and edible fats was approximately at prewar levels. Free and black-market supplies may contribute from 600 to 700 calories per day.

Outlook

Weather conditions in the spring are the strategic factor in Portugal's food production. Since as severe a drought as that which occurred in 1945 is unlikely, food production for the 1946-47 consumption year may be larger than that of 1945-46.

THE DANUBE BASIN

Hungary, Rumania and Bulgaria

Summary

The 1945-46 agricultural and food situation in all these countries is less favorable than during the war years, having deteriorated greatly in Hungary, considerably in Rumania, and somewhat in Bulgaria. Levels of consumption in Hungary, especially for nonagricultural consumers, are considerably below the prewar average caloric intake of about 2,600 calories; urban consumption in Rumania is also appreciably below the average prewar level of about 2,750 calories, and in Bulgaria somewhat below the 2,700 calories consumed in prewar years. These countries suffered greatly during 1944-45 from a combination of devastation during military operations, interruption of production and transportation facilities, and particularly from the most severe drought in modern history during the spring and summer of 1945. Unstable political conditions in all three countries and rapid and unsystematic land reform in Hungary, and to a lesser extent in Rumania, also contributed to the existing conditions, as did the presence of large Allied armies and heavy reparations included in the armistice conditions.

Average weather conditions during 1946 and continuation of the existing production, transportation, and distribution situation should result in a somewhat more favorable supply situation for 1946-47.

Background

These three countries were important exporters of agricultural commodities during prewar years, Hungary being 21 percent self-sufficient, the highest percentage in continental Europe, while Rumania, with 110 percent and Bulgaria, with 109 percent, were next in line. As a group, their prewar (1933-37) average exports in thousands of short tons were: wheat, 1,077; corn 655; barley 505; rye 161; dry legumes 144; sugar 26; vegetable oils 46; lard 21, and eggs 39. Large quantities of fresh fruits and vegetables, wine, oil seeds for crushing, and livestock and poultry for slaughter were also exported. Although the diet was poorly balanced, the average caloric intake per capita in all three countries was relatively high, as stated above.

During wartime years, production in general was well maintained, chiefly because of the primitive nature of the farming system of the region, apart from some large estates in Hungary and Rumania, and the fact that a good share of the farm work is done by women and children even during normal years.

Acreages planted to grain were well maintained throughout the war years, and decreased yields in some years were chiefly due to unfavorable weather rather than to shortages of manpower, draft power, or production equipment and facilities. The hardy Balkan peasantry continued to plant

and harvest their fields about as usual. Sunflower and other crops grown for vegetable-oil production also maintained their acreages well. Fruit and vegetable production in some cases actually increased. Livestock numbers were well maintained until about 1944. Large exports of grain, oilseeds or vegetable oils, and relatively large exports of fruits and vegetables and of livestock and livestock products were made to Germany during the earlier war years. Domestically, peasant consumption levels were well maintained, but urban consumers, apart from a favored few, found their food-consumption level decreasing as the war continued, because of increased foreign demands and peasant hoarding and less favorable transportation and distribution facilities.

Review of 1945-46 Consumption Year

In view of the existing situation in all three countries, it is difficult to give reliable quantitative estimates of production and consumption. Production has been best maintained in Bulgaria, whose acquisition of southern Dobrudja in 1940 increased its total area by 7.5 percent and its arable land by about 11 percent, where little fighting occurred and where agriculture has continued much as before. Approximately prewar acreages of wheat and corn were harvested, and the wheat crop was about 80 percent of prewar, but the corn crop, badly affected by drought, was only about 40 percent of prewar. Acreages of other grains were sharply reduced and production less than half of prewar. Acreages of other grains were sharply reduced and production less than half of prewar. On the other hand, the relatively unimportant potato crop doubled in acreage over prewar but produced only about 90 percent as much. The legume acreage and production both increased by about 75 percent. Sugar acreage was four times as large, but the resulting quantity of sugar will be about the same, while vegetable-oil production will be about half of prewar, on a slightly increased acreage. Fruit and vegetable crops were good, though transportation problems have resulted in reduced consumption outside of producing regions and resulting wastage of surpluses in the producing regions.

Livestock numbers have been relatively well maintained, cattle and hog numbers being reduced by only about 10 percent. Sheep numbers were reduced by 25 percent and poultry by nearly 50 percent. Improved breeding and management has maintained milk, butter, and cheese at prewar levels.

The total production of grain in 1944-45 is considerably below what was available for domestic consumption in prewar years after exports had been made. Peasant hoarding has resulted in nearly normal consumption by this group, and the urban population is hence consuming much less than formerly. This is also true of other food products.

The food situation in Rumania is less favorable than in Bulgaria. Bessarabia and Northern Bukovina have been lost and a large number of people from these regions are now in residual Rumania, many of them in Bucharest and other cities. In the fall of 1944 much less wheat was

seeded than normally, and lower yields caused a further reduction in potential supply, as did large takings under the armistice terms. Production of other small grains was much below average, and the corn crop, the most important crop in Rumania, was very small because of drought. Potatoes, legumes, and sugar are also in short supply. The fruit crop was good, but transportation is not available to move much of it far from producing regions, and this is also true of vegetables. Livestock numbers were heavily reduced, cattle by about 15 percent, sheep by 40 percent, swine and poultry by about 50 percent each. Feed and forage shortages and armistice takings will further reduce these numbers.

Peasants in the Danube plain, who normally ate only corn, are now eating white bread, while the urban population of Bucharest and other cities gets 300 grams of adulterated bread four days a week and cornbread on other days. Other foodstuffs are also in short supply for the urban population who outnumber the urban population of prewar days by at least half a million.

Conditions in Hungary are worse than in Bulgaria and Rumania. In addition to war devastation, a large and unsystematic land reform resulted in much land being unplanted. Lack of equipment and draft power and primitive methods on the land taken from large estates, reduced yields on the land actually planted. The severe drought further reduced production, and armistice takings have been heavy. This combination of unfavorable factors has resulted in the smallest food supply in modern Hungarian history. Transportation has also been severely interrupted and the urban millions are living on less than 1,500 calories daily, especially in Budapest where the caloric intake of most of the population is appreciably lower, in fact by far the lowest in the Balkans. Livestock numbers have been reduced more severely than in the other countries.

Unless more stable conditions develop, the 1946-47 situation will continue to be relatively unfavorable though certainly better than 1945-46 as 1946 fall plantings of grain are much larger than 1945 and spring plantings should also exceed those of 1945.

Outlook for 1946-47

With the cessation of hostilities and some improvement in the domestic political and economic situations, the outlook for 1946-47 is more favorable than for 1945-46, at least from a production point of view. It is doubtful whether any country carried out its projected plan for full seeding of grains. However, Bulgaria is reported to have seeded about 90 percent of its prewar acreage, and latest reports indicate a good snow coverage of the seeded grain. Hungary and Rumania have been less successful in carrying out their established quotas, which appear very ambitious in view of existing conditions. The widespread drought hampered seedbed preparations, as did chaotic political and economic conditions, and a large share of the acreage secured was planted very late and on poorly prepared land.

Ambitious plans for spring planting have also been announced. Livestock numbers will undoubtedly be further reduced, despite governmental regulations aimed at maintaining and if possible increasing numbers, because of a shortage of forage crops and feed grains, high black-market prices, and requisitioning by occupation forces.

The inadequate food consumption of the urban population will not increase proportionally with higher production, in view of continued peasant hoarding, induced by a rapid inflation of the currency, and an almost total lack of consumer goods. Stabilization of the political and economic situation in all these countries is an essential preliminary step in improving the urban food supply or in persuading the peasantry to more energetic and efficient production and marketing.

Albania

Summary

The Albanian food situation for 1945-46 has improved somewhat in recent months. Although domestic production is somewhat below prewar, UNRRA imports and reported shipments from the Soviet Union and Yugoslavia have supplemented domestic production. On January 1, the average caloric intake was estimated at 1,800 per capita daily, with the possibility of an increase to about 2,000 through improved distribution. The only item in short supply is sugar.

Prewar and Wartime Situation

Albanian agriculture has been operated chiefly on a pastoral, semifeudal basis, under which much of the small percentage of arable land in the country (about 11 percent) was left unplanted and the remainder tilled in a primitive manner. Foreign trade in foodstuffs was relatively small during prewar and wartime years, and the domestic production plus small net imports provided the population with a poorly balanced food supply, totaling little over 2,000 calories per capita daily.

Review of 1945-46 Consumption Year

About 41,000 metric tons (45,000 short tons) of wheat and 87,000 (100,000) of corn were harvested in 1945 as compared with 44,000 (48,000) and 127,000 (140,000) tons, respectively, during the 1933-37 period. Estimated 1945 livestock numbers show a decline of slightly over 10 percent in cattle numbers, less than 10 percent for sheep, and about the same number of goats and poultry as in prewar years. Olive and olive-oil production increased considerably over prewar years, due to relatively large plantings of olive trees during the 1930's.

Outlook

At the present ime, 1946-47 prospects appear more favorable than for 1945-46. A reported acreage of 52,500 hectares (130,000 acres) of wheat was sown in the fall of 1945, aided by imports of seed wheat, compared with the prewar average of about 40,000 hectares (100,000 acres). Plans call for planting 100,000 hectares (247,000 acres) of corn in the spring of 1946, instead of the prewar average of about 88,000 hectares (217,000 acres). Land reform has been effected to a relatively large extent and indicates a probable increased acreage of tilled land, while yields per acre are not likely to be much lower, in view of the primitive nature of farming practices prevailing prior to the reform. If the weather is favorable or even average during 1946, the 1946 harvests and resulting 1946-47 food supply from domestic production should be satisfactory. Small imports of bread grains and sugar, which is not produced in Albania to any significant extent, appear necessary, however.

Yugoslavia

Summary

The general food situation in Yugoslavia appears to have improved somewhat in recent months. The average daily diet obtained from domestically produced food varies greatly in total caloric intake - from over 3,000 calories in the surplus-producing areas to below subsistence level in the deficit zone. This diet, even where adequate in total caloric intake, is very seriously short of meats, dairy products, and fats. The main reasons for the decreased agricultural production and the general food problems in 1945-46 are: (1) war ravages; (2) shortages of draft power, labor, and machinery; (3) tremendous damage to transportation, processing, and marketing facilities; (4) increased waste and spoilage; (5) often rather radical changes in the economic and political structure of the country, such as in land ownership and tenure, production and marketing of agricultural products; and (6) shortage of consumer goods.

Prewar and wartime situation

Normally Yugoslavia exported about 660,000 short tons of grain, mainly to Western and Central Europe, as well as meat and cattle to neighboring countries. With the possible exception of rice and vegetable oils, the country was self-sufficient, providing an over-all level of about 2,700 calories per person.

While the prewar diet was already markedly unbalanced, cereals providing about 75 percent of the total caloric consumption, this fact was even more exaggerated during the war years. The organization of agriculture, as well as the distribution and delivery channels, were very primitive, the greatest problem being to supply the deficient zone with enough food in time to avert hunger. During the war, with the manifold divisions of the country among the various Axis powers, even these channels broke down, and available surpluses from the northeastern part of the country did not get to the deficient zone, going to Germany instead. Thus, hunger was widespread among the people of the deficient zone and urban centers.

Situation in 1945-46

The country can be divided into three agricultural zones, namely, a surplus-producing zone, a self-sufficing zone, and the food-deficient-producing zone, with about 5 million people in each zone. Today this division is even more pronounced because of the broken-down transportation system, which increased the difficulty of moving available surplus from one part of the country to another. The surplus zone, lying in the northeastern part of the country and embracing the richest agricultural region, the Vojvodina, normally provided the bulk of the food shipped abroad and to the deficient zones. To the west of this zone, and stretching all through the length of the country is a zone

about self-sufficient in food products, except in the larger urban centers. The third or deficient zone, lying along the Adriatic coast and including most of the mountainous regions of Bosnia, Herzegovina and Montenegro, as well as a part of Macedonia, is unable to provide its own food needs. Even in prewar years this zone needed about 660,000 short tons of cereals from the other zones. It is to the deficient zone and the larger urban centers that UNRRA supplies are being shipped to provide the basic necessities and a somewhat better-balanced diet.

While total grain production has decreased about 32 percent since the prewar years, the amount used for human consumption has decreased only 23 percent, as more corn is being used for food. This fact, together with the prevailing high extraction rates, reduces this decrease to about 18 percent in terms of flour. The 1945 acreage in grains declined 23 percent from prewar, the greatest decline occurring in the acreage planted to wheat and rye, over 40 percent, but the acreage in barley was down 23 percent; in millet, buckwheat, meslin, and spelt 13 percent; and in corn 10 percent.

The only increase in acreage was in oats and amounted to nearly 20 percent. This increase was due largely to the fact that acreage usually sown to winter wheat was planted in oats in the spring. The reduction in the other grain acreages was caused by (1) interruption of the fall sowing in 1944 by hostilities in the main producing areas; (2) unfavorable weather conditions, especially in Bosnia and Herzegovina; and (3) shortage of seed; while poor quality of seed, poor preparation of seed bed owing to lack of man power, draft animals, and equipment resulted in decreased yields per acre, especially of wheat, which was 40 percent below prewar.

The available grain supply should be considered in the light of the serious collection problem. Grain is collected by Government agencies. Regulations require the delivery of all surplus on farms above 292 kilograms per head, but farmers are reluctant to deliver fully because they can obtain better prices on the black market and because of scarcity of consumer goods.

Livestock numbers have been greatly reduced. Compared with 1933-37, the decline in horses is 37 percent, cattle about 30 percent, sheep 29 percent, hogs 18 percent, goats 8 percent, and poultry 34 percent. These losses in livestock affect not only the immediate food supply but agricultural production generally. The Government is trying to restore livestock numbers by such measures as strict supervision of slaughtering and redistribution of available numbers, especially sheep. Total meat production is estimated to be about 45 percent below prewar, both because of the smaller number of animals slaughtered and the greatly reduced weight of individual animals.

Supplies of dairy products have been similarly reduced. Poultry meat is the only meat available without restriction, and, owing to the large exports before the war, the present supplies compare favorably with prewar domestic consumption. However, a recent outbreak of a

serious poultry disease might considerably alter this situation. Egg production of 54,000,000 dozen will be about 25 percent below the prewar consumption level; and because of extremely unfavorable price ceilings, supplies to the nonproducer may be much more sharply reduced. Not much can be expected from this year's fish supplies, because of lack of equipment. However, fish is not rationed at the present time.

The fats-and-oils situation is unfavorable. While the total available vegetable-oil supply has decreased only about 13 percent, the animal-fat supply has been reduced to a much greater extent. Actually, the acreage in oil-bearing crops has been doubled, compared to 1933-37, with an exceptionally large increase in sunflowers; the above-mentioned decrease in available supplies for food is explained by the planned increase of 100 percent in the 1946 sunflower acreage, calling for a correspondingly increased amount of seed, and the poor yields per acre. Dry legumes are in about the same supply as prewar. Potatoes are scarce. A reduction of 40 percent in available supplies is estimated, due, apart from the 24-percent reduction in total production, to the necessity of reserving a large proportion for seed and possible use for feed. The discrepancy between the decline in total production and that available for human consumption again brings out one of the chief factors in the unfavorable Yugoslav food situation: that possible supplies available in one section of the country cannot be shipped to other places because of lack of transportation or disrupted marketing facilities and are thus used for feed in the producing areas.

Vegetable, fruit, and nut production was in general favorable, with amounts available for consumption again varying greatly from region to region. A small amount of dried fruits and jams might even be available for export.

The area in sugar beets in 1945 was nearly 40 percent below the 1933-37 average. Very poor spring weather adversely affected the already poor stand, and the resultant production of refined sugar is less than half of the prewar output, making it an extremely scarce consumer item.

Outlook for 1946-47

The 1946-47 outlook ismore favorable for crops than for livestock. In general, the aim of the 1946 cropping plan is to return to approximate prewar acreages for most crops. Large increases are anticipated in the industrial crops. In order to make possible these increases, as well as an increase in the potato acreage, a decrease in grain crops of about 5 percent from the 1939 acreage is planned. A small decrease in forage crops also is planned. The total acreage goal for all crops is only 1.4 percent below 1939, but much higher than in 1944-45. Fall plowing and seeding was accomplished under favorable conditions, and the acreage sown compares favorably with the goals set in the plan. The whole plan appears sound, and the proposed increase in industrial crops will be of great benefit to both the farmer and the consumer.

YUGOSLAVIA: Production and trade in food products 1933-37, and estimated production 1945-46, by major commodity groups

Commodity	Estimated total production		Domestic production available for food 1/		Net imports	Net exports
	1933-37 average	1945-46 2/	1933-37 average	1945-46 2/	Average 1933-34 to 1937-38	Average 1933-34 to 1937-38
	1,000 short tons					
Grains	8,643	5,859	4,090	3,167	--	711
Grains for food, in terms of flour	---	---	3,489	2,850 3/	--	---
Sugar, refined basis	73	35	73	35	--	---
Potatoes	1,744	1,323	1,059	639	--	---
Dry legumes	165	132	121	119	--	29
Meats (carcass weight including offals)	354	197	354	197	--	21
Fats for food (fat content)	127	79	127	79	3	---
Whole milk (for fluid consumption)	---	---	1,853	992	--	---
Eggs	54	32	44	32	--	10

1/ For complete prewar food balance giving per capita consumption, see appendix.
2/ Preliminary
3/ At present 90 percent extraction rates.

Greece

Summary

The domestic production of foodstuffs in Greece in 1945 was only about 65 percent of prewar, and will provide an overall daily caloric intake of about 1,250 calories per person. A 15-percent acreage reduction in food crops below prewar, the severe drought of last summer, lack of draft power, manpower, and agricultural implements, disrupted transportation facilities, and generally unstable economic conditions - all were factors in this year's low production. There is also a tendency for producers to keep a larger part of their products, so that the amount of food supplies varies greatly between rural and urban regions. The UNRRA rations have greatly alleviated this extremely unfavorable situation in the larger cities and have increased the total over-all caloric intake of the population to somewhat more than 2,000 calories, at the same time providing a more balanced diet. However, this total caloric intake still varies greatly according to the location of the consumer.

GREECE: Production and trade in food products, 1933-37 and estimated production 1945-46, by major commodity groups

Commodity	Estimated total production: 1933-37 average	Estimated total production: 1945-46 2/	Domestic production available for food 1/: 1933-37 average	Domestic production available for food 1/: 1945-46 2/	Net imports: Average 1933-34 to 1937-38	Net exports: Average 1933-34 to 1937-38
	1,000 short tons					
Grains	1,517	912	704	498	529	---
Grains for food, in terms of flour	---	---	602	445 3/	448 4/	---
Sugar, refined basis	---	---	0 5/	0	73	---
Potatoes	143	132	98	88	6	---
Dry legumes	76	42	66	33	22	---
Meats (carcass weight including offals)	111	97	111	97	22	---
Fats for food (fat content)	140	112	150	112	---	10
Whole milk (for fluid consumption)	297	143	297	143	3	---
Eggs	25	17	25	17	1	---
Dried fruits	239	99	110	99	----	129

1/ For complete prewar food balance giving per capita consumption, see appendix
2/ Preliminary.
3/ At present 90 percent extraction rates.
4/ At prewar extraction rates.
5/ No sugar was produced.

Prewar and wartime situation

Greece, although essentially an agricultural country, imported from 20 to 25 percent of its food supply in prewar years, including about 40 percent of the wheat consumed and allef the sugar. Olive oil was almost the sole source of fats and was produced in surplus quantities, an average of about 12,000 short tons being exported annually. The importance of imports in the prewar food supply of Greece together with their relation to domestic production is shown in the above table.

During the war, losses of peasant manpower and draft power, military operations, Axis occupation, disruption of transportation, and unfavorable weather in some years combined to severely reduce agricultural production and even more drastically reduce food supplies available for urban consumers. Imports by sea, so important to Greece, were cut off altogether. Fortunately, shipments of wheat, dried legumes, fish, condensed milk, sugar, and other products through the International Swedish-Swiss Relief Commission alleviated the situation in Athens and some other centers until the arrival of the Allied armies and the beginning of UNRRA operations.

Situation in 1945-46

Agricultural production was affected greatly by the war. Greece is a country with many areas of specialized agriculture, and the disruption of transportation cut off markets and discouraged production much more than in areas where agriculture is more self-sufficing. The shortage of draft power and other production facilities, brought about by the war, has not yet been fully relieved. To this must be added the fact that the producer very often is not willing to part with his products because of the lack of consumer goods. There is no rationing of domestic products, which are sold in the open, uncontrolled market at tremendously inflated prices. UNRRA supplies are rationed and sold at fixed prices to those who can afford them and are free to the indigents, of which there are many. These rations vary greatly from place to place, according to the domestic supplies of foodstuffs available locally.

Total domestic grain production is down about 40 percent from 1933-37, though grain available for human consumption in terms of flour is only 25 percent less because of higher extraction rates and increased use of corn and barley for direct human consumption.

Livestock numbers have declined substantially below prewar numbers, horses and mules by about 45 percent, cattle by 40 percent, sheep and pigs by 30 percent, poultry by 25 percent, and goats by 15 percent. Slaughterings have been encouraged by drought-damaged pastures and shortage of feed grains, and hence meat production is only 15 percent below prewar. Milk production is about 35 percent below prewar. Production of fats and oils is fairly satisfactory, though only very limited supplies are available to consumers in nonproducing regions.

The fish industry is in poor condition, because of lack of equipment. Thus a decrease in the fish catch of about 50 percent from prewar is estimated.

Potatoes are in good supply, the total available for human consumption being about 10 percent less than the 1933-37 average. On the other hand, the available dry legume supplies are only about 50 percent of prewar.

Fruit, nut, and vegetable production compared fairly well with prewar, but distribution was uneven. It is likely that some dried fruits, citrus fruits, and nuts will be available for export.

Outlook for 1946-47

The outlook for 1946-47 is uncertain in view of the existing political and economic situation. Production prospects are favorable, with draft power, seed, and machinery more likely to be available than in 1944-45 or even 1945-46. Sowings of fall grains equivalent to 1933-37 averages are reported, much winter work is in progress and plans well advanced for spring sowings. With average weather conditions, 1946 production should be appreciably better than 1945.

The present inflation and general economic disorganization, however, make it difficult to secure surplus food supplies from the peasantry, and this situation may well persist unless conditions improve. Continued UNRRA shipments will of course play an important role during the coming year.

French North Africa

Summary

Drought so reduced production in French North Africa in 1945 that this formerly food-surplus-producing regiong has had, and must continue, to rely nostly on imports to meet ration requirements in the current consumption year. Reasonably favorable weather conditions for the 1946 crop should bring an increase in output, but even under the best of circumstances it is doubtful whether French North Africa, whose population has increased from 16 million in 1936 to over 20 million at the present time, will be in a position to export any significant quantities of food in 1946-47.

Prewar and wartime situation

Before the war, Morocco, Algeria, and Tunisia generally produced a surplus of wheat and barley, the great staple foods in French North Africa. All three countries also exported olive oil, which used to be the most important kind of fat in the region but which was to be largely replaced by peanut oil. In the period 1933-37, only Tunisia had an export surplus of edible oil, though it was about large enough to offset the deficit of Algeria and Morocco. Grains, wine, olive oil, sheep, fruits, and vegetables accounted for three-fourths of the value of French North African exports in 1933-37. Food imports consisted mainly of sugar, vegetable oil, livestock products, coffee, and tea.

During the war years preceding the Allied landing in North Africa, the region made considerable effort to help provision France. Exports of fruits and vegetables were increased. Exports of most other foods, on the other hand, dropped well below the prewar level. Crop production was appreciably above average in 1941, but shortages of such imported goods as peanut oil, sugar, tea, and cotton cloth, coupled with distrust of paper currency, removed much of the producer's incentive to bring his crops and livestock to market and so contributed to the development of hoarding and black-market operations in domestic as well as imported produce. Thus supplies offered publicly for consumption in urban areas or for export were reduced, and rationing, on a local or country-wide scale, came to be applied to a variety of commodities.

After 1942 French North Africa shifted from an export to an import basis for food. Crops were below average in 1942, 1943 and 1944, and food controls continued to be largely ineffective. Grave shortages would have prevailed in urban areas had not substantial quantities of wheat as well as some oil, sugar, and other foodstuffs been shipped in. As it was, those consumers who had to live mainly on rations were afforded a meager diet. Those who could pay black-market prices or otherwise obtain food illegally fared, as in other countries, quite well.

Review of the 1945-46 consumption year

Weather conditions for the 1945 crop were unusually adverse, especially in Morocco, where the season started badly with delayed autumn

rains, which restricted plantings, and continued with little rain in the last half of the growing season. To the east, autumn weather was not a limiting factor, and Tunisia greatly expanded the sown acreage, but the whole region suffered severely from drought in the spring and summer.

Acreage under wheat and barley, which covered 84 percent of the sown area in the period 1933-37, was reported for 1945 at little more than four-fifths of the prewar average. Production of wheat and barley in 1945, according to official estimates, which are believed to understate output in Algeria and especially Tunisia, was little more than one-fourth of the 1933-37 average. Output of feed grains and dry legumes was also far below average. Edible olive oil production will probably not exceed 30,000 tons, as compared with an average of 70,000 tons for the 10 years 1929-30 to 1938-39.

Meat production increased during 1945. With the acute shortage of feed and forage, sales of livestock for slaughter were abnormally heavy and mortality rates were high. Information is not available as to 1945 livestock numbers in Algeria. In Morocco, the number of cattle in 1945 was reported to be down by 40 percent as compared with 1944, sheep by 25 percent, goats by 9 percent, and hogs by 66 percent. In Tunisia, the reduction in sheep numbers was heavy, but cattle and pig numbers appear to have been maintained. However, since livestock numbers had shown a marked increase in both countries (and also Algeria) during the war years, Morocco and Tunisia together still have as many cattle, sheep, goats, and pigs as before the war.

During the early part of the current consumption year, supplies of food grain for rationed distribution were very tight. With the receipt of large wheat imports, however, the flour extraction rate could be reduced to 85 percent and the bread ration in Morocco and Tunisia raised to the level prevailing in Algeria. All three countries now have a bread ration of 300 grams per day. Sugar is rationed at the rate of 400 grams per month in Morocco and Tunisia and 500 grams per month in Algeria. The oil ration in Tunis was cut in December from 1 liter to 1/2 liter per month, approximately the equivalent of the Moroccan ration of 300 grams of oil and 250 grams of margarine per month. Assuming that the ration of oils and fats in Algeria is about the same as in the other two countries, rations of bread, sugar, and fat in urban areas would provide about 1,000 calories daily. Other rationed and unrationed products and food purchased through the black-market no doubt raise the average energy intake in cities considerably above 1,000 calories per capita per day.

Outlook

Unless the weather is exceptionally favorable during the first half of 1946, crop production in that year is not likely to approach the prewar average. In Tunisia, the tardy arrival of autumn rains delayed sowings, with the result that by the end of December little more than half as much land had been planted to wheat, barley, and oats as was planted for harvest in 1945, and about two-thirds as much as was planted on the average in 1933-37. In Morocco, with fall seedings just ending under good weather conditions, wheat and barley acreage for harvest in 1946 is reported at two-thirds the 1945 acreage and about half the average for 1933-37. Shortage of seed and of draft animals, whose numbers are said to have been sharply reduced by the drought, appear to be the chief reasons for the decline in Moroccan acreage.

SOVIET UNION

Summary: Food in the Soviet Union is still rationed with almost wartime severity. But the improvement though slow, in the agricultural situation since the summer of 1945 has resulted in better fulfillment of official rations and an increase of the bread ration for children thus far in 1945-46. Also, in the nonrationed commercial stores and the free private market, food prices have been lowered, although they are still very high for the average consumer.

It was officially announced that the total planted acreage on collective farms increased 2 percent in 1945 as compared with 1944, while the grain area alone increased 3 percent, but was still somewhat below prewar. In the area freed from the German invaders, which accounted for about 40 percent of the total prewar crop acreage, collective farms had sown, in 1945, up to 69 percent of prewar acreage for all crops and 75 percent of prewar acreage for all grain crops. A slight improvement in yields, together with larger acreages, resulted in a somewhat greater production of crops in 1945 over 1944. Domestic sugar production was roughly about 50 percent of prewar in 1945 as compared with about 20 percent in 1942, when sugar production reached its lowest level. The meat supply also improved, but the fats situation continues to be tight.

The discontinued lend-lease shipments of foodstuffs, which played an important part in the wartime food supply, were offset to some extent by supplies, including livestock, acquired in the occupied Axis countries. Continuation of the gradual improvement in the food situation is expected in 1946-47 with the growing agricultural recovery of the Soviet Union.

Prewar and Wartime Situation:- Before the second world war the Soviet Union was either self-sufficient or on an export basis with regard to foodstuffs and feedstuffs, except for some subtropical or tropical products, the imports of which were small. The exports of foodstuffs and feedstuffs, however, such as grain, butter, sugar, etc., were much smaller during the inter-war period than before the first world war, when Russia played a leading role in the world trade of agricultural products.

The domestic food situation, which was adversely affected by the first world war and revolution, improved with the agricultural and economic recovery in the middle twenties, but deteriorated sharply in the early thirties, with the collectivization of Soviet agriculture, and the accompanying serious losses of livestock. While an improvement in the food situation again occurred in the middle thirties, nevertheless there was available less meat, animal fats, and dairy products for consumption. Thus, in 1938, when livestock numbers had recovered considerably, production of meats and fats was 8.5 percent below that of 1928, or, if exports are excluded and only domestic supplies considered, 2.4 percent; and production of milk was 5.3 percent below, while population increased by approximately 10 percent.

The German invasion dealt a severe blow to Soviet agriculture. About 40 percent of the prewar crop area was in the regions which, at one time or another, were invaded by the enemy. The invaded territory included some of the best producing regions, with favorable soil and climatic conditions, highly developed agriculture, and a large railway network, which supplied surplus foodstuffs for other parts of the country. The Soviet Union, in 1941 and 1942, practically lost its best yielding winter wheat belt, its principal sugarbeat regions, and much of its oilseed area. To a large extent, the country had to rely for its food supply on regions of more precarious agriculture.

Much of the mechanized equipment on which Russian farming became dependent as a result of collectivization in the 1930's, was destroyed or damaged in the invaded zone. According to official figures, 137,000 tractors, 49,000 combines 1/, about 4,000,000 plows, harrows, and other tillage implements, 265,000 planting, and 885,000 harvesting implements, were destroyed. 2/ In addition, the enemy destroyed 137 agricultural research institutes, 176 poultry incubation stations, and 14 plant breeding stations that supplied the collective farms with high quality seed. Much damage was done to food-processing plants, especially in the sugar industry, which is concentrated in the invaded zone. Destruction of 204 sugar mills, 47 canneries, 29 oil mills, and many other establishments was reported. The drain of manpower from the occupied regions into Germany is well known.

Livestock losses were also very heavy. They included 7,000,000 horses out of a total of 12,000,000 in the invaded territory; 17,000,000 cattle out of a total of 34,000,000; 20,000,000 hogs, 27,000,000 sheep and goats, and 110,000,000 head of poultry.

Adverse factors that operated in the univaded territory were: the depletion of manpower available to agriculture due to mobilization of the Red Army; diversion of horses and tractors for army use, with the resulting shortage of draft power; practical cessation of the manufacture of farm implements, spare parts, and commercial fertilizar (important in the case of so-called technical crops).

Nevertheless, the acreage in the univaded zone apparently was maintained, or, as in the case of potatoes and vegetables, considerably increased, thanks to the work of women, old men, and children, aided by urban dwellers mobilized for farm work. Moreover, millions of urban families were growing potatoes and vegetables on special garden plots. In general, a shift from nonfood to food crops is indicated

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1/ In 1940, the Soviet Union had 523,000 tractors and 182,000 combines.
2/ These figures apply to the whole territory invaded by the Germans, including the Baltic republics, and the territories under Polish or Rumanian control until 1939-40.

by calculations based on percentage figures given by an authoritative Soviet source. (These figures include, in addition to the territory that was not invaded, also some of the liberated Provinces: Moscow, Tula, Voronezh, Stalingrad, Kalmyk, and the whole Don-North Caucasus.) In 1943, the total sunn acreage in the above-mentioned area was 7.5 percent below 1938; grain 8 percent, cotton 34.5 percent, and flax for fiber 22 percent below. On the other hand, potatoes, in 1943, were 28.5 percent above 1938, vegetables 84 percent, sunflower seed 6 percent, and sugar-beet acreage doubled. Such acreage increases, however, as had occurred in the univaded regions only to a small extent compensated for the reduction due to invasion. Moreover, the crop yields per acre generally declined because of deterioration in farm practices and shifting of some crops to new regions.

The resulting serious gap in the food supply necessitated considerable lend-lease shipments of foodstuffs by the allies, principally by the United States. During the period of lend-lease operations through September 30, 1945, 1,862 million pounds of fats and oils, which is equivalent to more than half of the estimated 1938 Soviet production, and 1,988 million pounds of meat, which is equivalent to a quarter of the 1938 Soviet production, and many other foodstuffs, were shipped from the United States to the Soviet Union. But, while the Soviet Army was well fed with the help of these supplies, the civilian population experienced an extremely tight food situation. This is reflected first of all in the small official ration.

Since the autumn of 1943, when the bread allotment was reduced, the calories supplied by the ration in large cities ranged from approximately 800 for dependents to 1,900 for workers in heavy industry. Except for bread, even this meagre ration was seldom met in full during the war years.

The city population could supplement the ration to some extent by production of potatoes and vegetables in their garden plots or by purchases on the free private market. But the prices of foodstuffs in the private markets, which are entirely uncontrolled, have been very much higher than the prices of rationed commodities sold in Government stores. Thus, a kilogram (2.2 pounds) of black bread in Moscow, in July 1943, cost on the private market $12.50 (at the exchange rate of 12 rubles to the dollar) as compared with $0.08 on the ration in the Government stores. Butter cost $66.67 a kilogram, beef $33.33, sugar $75.00, on the private market, as compared with $2.17, $1.17, and $0.46, respectively, for rationed products. In the spring of 1944, the Government opened in Moscow so-called commercial stores where foodstuffs were sold on a nonrationed basis, but at very high prices, corresponding to those in the private market.

The 1945-46 Situation.- The complete liberation of the invaded area, and occupation by the Soviet forces of a considerable surplus-producing territory beyond the borders of the Soviet Union, presaged an improvement in the food postion of the country in 1945-46. There is, however, a considerable lag (because of the shortages of manpower, draft power, and fertilizers, weedy fields, disturbance of crop rotation, and heavy livestock losses) between liberation of invaded territory and agricultural recovery.

Statistical data available are still too inadequate to describe the agricultural and food situation with quantitative precision. It was officially announced that the total sown acreage on collective farms in the Soviet Union increased 2 percent in 1945 as compared with 1944, while the grain harvest area alone increased 3 percent and that under vegetables, melons and potatoes increased 6 percent. These increases presumably do no include, for the most part, territories formerly under Polish, Rumanian, and Czechoslovak control, and the Baltic Republics, where there are few collective farms. The volume of tractor work of the machine tractor stations servicing the collective farms increased by 22 percent in 1945 over 1944, but was only a little over a half of the 1939 volume.

In the area freed from the German invaders, collective farms had sown, in 1945, up to 69 percent of prewar acreage for all crops and 75 percent of prewar acreage for grain crops. On collective farms of the Ukraine alone, 71 percent of the total prewar crop acreage and 81 percent of the prewar grain acreage was planted in 1945, as compared with 65 percent and 75 percent, respectively, in 1944.

The Government plan called for an increase in total crop acreage for 1945 harvest in the Soviet Union of 20 million acres, including an increase on collective farms of 14.6 million acres, and 1.5 million acres on state farms and subsidiary allotments. The remaining acreage increases were to take place on individual private farms in the western regions of the Soviet Union.

No differentiation between winter and spring crops, or any mention of them, was made in the official plan for 1945 or in published Soviet documents thereon. But it was subsequently reported that the plan for all spring sowings was fulfilled by 100.1 percent and for spring grains by 102.8 percent. There is reason to believe, however, that the Government program for winter crops failed, thus offsetting the expansion in the spring-sown area.

The winter crops in the Soviet Union are bread grains, rye and wheat, and small quantities of barley. In 1938, rye accounted for 58 percent and wheat for 40 percent of the total winter acreage. During the war, the winter wheat belt in the Ukraine and North Caucasus suffered from invasion, and the winter grain expansion in the uninvaded eastern regions was in the more hardy rye.

Despite the probable reduction in the winter acreage for 1945 harvest, the total grain area increased by 3 percent, as compared with 2 percent for all crops. The official 1945 plan stressed the importance of an increase in spring wheat. During the war, in eastern regions, where spring wheat is normally a staple, it was being displaced by other crops, particularly winter rye and millets. Before the war, spring wheat predominated over winter wheat, accounting for over 60 percent of the total wheat acreage of the U.S.S.R.

It is evident that the Soviet Government is emphasizing the importance of bringing the grain area up to the prewar level, and its recovery has been most rapid. Grain has been the backbone of the Russian diet and of the official rationing system. While no overall increase in the bread ration has occurred since it was reduced in the autumn of 1943, nevertheless this ration has been completely fulfilled, whereas the rations of other foodstuffs often have not been fulfilled and, in many cases, substitutions have been made.

It was reported that the sugar-beet acreage, increased by 119,300 hectares (295,000 acres) in 1945, bringing it to two-thirds of prewar; vegetables, melons, and potato acreage by 210,000 hectares (519,000 acres), and the cotton acreage by 52,000 hectares (128,000 acres).

Weather conditions for the most part were not conducive to better-than-average yields in 1945. For all crops, however, a slight improvement in yields may be said to have taken place in 1945 as compared with 1944. This increase in yields, together with larger acreages, resulted in a somewhat greater production of crops in 1945 over 1944.

Domestic sugar production recovered considerably after the liberation of the sugar-producing regions of the Ukraine and the adjacent Kursk and Orel Provinces. The Ukraine alone produced three-fourths of the Soviet Union's sugar supply in prewar days, and its loss dealt a severe blow to the sugar industry.

Sugar production, which, in 1942 was roughly only about 20 percent of prewar, reached about 40 percent in 1944 and about 50 percent in 1945. As a result, the official sugar ration in the autumn of 1945 was increased.

Livestock numbers in the Soviet Union increased about 6 to 7 percent during 1945, with the largest increases in hogs and cattle. Part of this increase was due to the acquisition of livestock (mostly cows) from former Axis countries. A strong effort is being made to build up the communal herds of collective farms in the liberated regions, which suffered especially severely during the invasion. Most of the livestock for communal herds is acquired from individual owners. In the Ukraine there were thus transferred to the communal herds during the past two years 1,628,400 calves, 91,500 young pigs, and 149,200 lambs. In spite of the continued increase, by the end of 1945, according to preliminary estimates, the number of cattle in the communal herds of the Ukrainian collective farms constituted 63.2 percent of prewar numbers, hogs 24.1 percent, sheep 27.7 percent, and horses 30.8 percent.

The improvement in the livestock situation was reflected in an increased meat supply. This is evidenced by the improved fulfillment of the official meat rations. Since the fall of 1945, meat has been supplied in place of a certain portion of the fats ration when a shortage has developed in stores.

The fats and oils situation continues to be tight. Although the production of butter and animal fats increased in 1945 over 1944, and oilseed acreages also increased, the production of vegetable oil appears to have been somewhat lower for the comparable territory, because of a poorer sunflower crop in 1945 than in 1944. Moreover, the consuming population also increased. The cessation of shipments of lend-lease supplies of fats and oils removed a source of a large supply of fats, but this loss was partly offset by smaller requirements due to the end of the war. Fats and oils needed by industry (largely for war purposes) have been reduced, and the requirements of Red Army troops stationed in countries outside the Soviet Union are in large part being met by those countries. That an overall deficit occurred, however, was reflected by the requirement that all rationed consumers had to take meat in place of a certain part of the fats ration beginning in November 1945.

The Outlook for 1946.- The food situation in the Soviet Union, while still rather grim, has been slowly improving since the summer of 1945. This is evidenced by better fulfillment of rations, the increased sugar ration for all categories and bread ration for children, and successive reductions in prices in the nonrationed commercial stores and the free private market, though they are still at very high levels from the standpoint of the average consumer. It is expected that, barring unfavorable weather conditions during the spring and summer of 1946, the food situation will continue to improve during the second half of 1946 as more manpower, draft power, and machinery become available for increased production and better distribution of foodstuffs. The importance attached to the manufacture of agricultural machinery, including tractors, is attested by the creation, at the beginning of 1946, of a new Commissariat of Agricultural Machinery, to which a number of war plants have been assigned. Much attention is also given the so-called technical, or industrial, crops, including such important food crops as oilseeds and sugar beets, the production of which is placed under a new Commissariat of Industrial Crops.

THE MIDDLE EAST

Summary

Estimates of the crops harvested in the summer and fall of 1945 indicate that the Middle East will be assured of ample food supplies during the 1945-46 crop season.

The Middle East is a predominantly agricultural and pastoral region, depending for its food requirements mainly upon cereals and upon livestock products derived mostly from sheep and goats and to some extent cattle. Other important food items are dry legumes, vegetable oil, fresh and dried fruits, sugar, and nuts. In normal prewar times, with the exception of Palestine which was a heavy importer of food, the region as a whole was able to produce enough to meet practically all of its major food requirements. It exported substantial quantities of citrus, dried fruits, cereals, nuts, and vegetable oil and imported sugar, tea, and coffee.

Weather conditions during 1945 in all parts of this area, except Turkey, where cereal crops suffered to some extent from drought, were favorable for the production of food products. At the same time, livestock has been in very good condition. As usual, Palestine will have to import heavily in order to satisfy its food needs. On the other hand, Syria and Lebanon will have enough for domestic consumption; Egypt will have a record exportable surplus of rice and the normal surplus of sugar; Turkey will be able to supplement its short cereal crops from ample carry-over stocks and offer for export some livestock, sugar, olive oil and large quantities of dried fruits and nuts; Iraq will have substantial surpluses of cereals and dates, and Iran will be able to take care of its major food needs and export large quantities of cereals, dried fruits, and nuts.

As far as can be ascertained at present, the outlook for the 1946 harvest is promising. Draft power and labor are ample, weather conditions have been good, and fall sowing has been accomplished as usual. A change back to normal production of cotton is expected in Egypt. This will mean an increase in cotton acreage at the expense of acreage allotted to food crops. On the other hand, an increase in the yield of food crops is expected as a result of larger applications of imported nitrogenous fertilizers.

Egypt

Summary

Egypt has reason to face with confidence the food situation this year. Grain production ranged from good to excellent, with a bumper crop of rice that will leave a record exportable surplus. There will also be substantial exportable surpluses of sugar and onions.

Prewar and Wartime Situation

In the period immediately preceding the war, Egypt was practically self-sufficient with respect to most of its foodstuffs. Surpluses of rice, onions, cottonseed oil, and sugar were exported. Some potatoes, nuts, vegetable oil, meat, and dairy products, and all of the coffee and tea were imported. This apparent self-sufficiency, however, is relative to the prevailing Egyptian standard and does not necessarily indicate an adequate diet. In fact, it is known that Egyptian diet in general is deficient in meat and dairy products and suffers from a lack of seasonal distribution of perishable protective foods.

An important item that had direct bearing upon Egyptian agricultural production was nitrogenous fertilizers, all of which had to be imported. About 550,000 tons were used annually, most of which came from Chile and Germany. Also all of Egypt's agricultural machinery was imported, mostly from England, Germany, and the United States.

During the war period, trade with the outside world was disrupted, and important changes occurred in the normal situation. In the first place, a drastic reduction in the importation of agricultural machinery and of essential fertilizers took place. The problem was solved gradually and partly by allowing Egypt limited shipments of these two items. Another serious problem was the decline in yields. This was the result of more intensive cultivation of the soil for food crops, shortage of fertilizers, and disruption of the normal crop rotation. Total production of food crops, however, was maintained at prewar levels, and in some cases increased. This was accomplished mainly by reducing the acreage of cotton, the main cash crop of Egypt, by about 50 percent, and by reclamation of swamp-land. Consequently, the crops harvested in the summer and fall of 1944 were sufficient to meet the country's needs and leave substantial surpluses of rice, durra, and sugar, which were exported. The wheat crop, however, was unusually short, and substantial quantities of this commodity had to be imported.

The Situation in 1945-46

Total grain production of 1945-46 is sufficient to take care of the country's needs until the harvest of 1946. Although the wheat crop harvested was up to the prewar level, it is estimated that about 85,000 tons would need to be imported in order to maintain the increased consumption of this commodity, as compared with prewar years. The deficit, however, will be more than counterbalanced by an excellent crop of paddy rice, amounting to 941,000 short tons, which leaves an exportable surplus of 281,000 tons in excess of estimated domestic requirements. The amount of rice available for export, however, will depend to some extent on offsetting imports of wheat. The barley and corn crops also are slightly above the prewar average, and the grain sorghum crop is one of the largest on record. Consequently, there will be ample supplies of these commodities to meet the domestic food and feed needs and leave an exportable surplus.

EGYPT: Production and trade in food products 1934-38 and estimated production and exports 1945-46

Commodity	Estimated production		Apparent domestic disappearance		International trade		
					1934-38		1945-46
	1934-38	1945-46	1934-38	1945-46	Net imports	Net exports	Net exports
	1,000 short tons						
Wheat	1,305	1,303	1,313	1,388	8		
Corn	1,781	1,862	1,785	1,862	4		
Rice (paddy)	664	941	504	660		160	281
Barley	248	289	240	289		8	1/ -
Grain sorghum	470	812	463	812		7	
Total grains	4,468	5,207	4,305	5,011		163	196
Potatoes	46	n.a.	65	n.a.	19		-
Sugar, refined	159	190	2/ 112	2/116		3/ 47	4/ 74
Dry legumes	443	459	446	459	3		-
Onions	257	174	114	123		143	5/ 51
Dates	441	353	451	353	10		-
Oil, cottonseed	55	46	44	69		11	
Oil, other	8	11	26	11	18		-
Total veg. oil	63	57	6/ 70	7/ 80	7		
Total meat	161	8/	161	8/	-	-	-
Poultry	10	8/	10	8/	-	-	-
Eggs (dozen)	60,000	8/	55,000	8/	-	5,000	-
Milk	524	8/	575	8/	51	-	-
Tea	-	-	8	6	8		
Coffee	-	-	8	7	8		

n.a. Not available.

1/ There is a possible surplus of about 40,000 short tons from carry-over stocks.

2/ In addition about 20 percent of the total cane crop is consumed fresh or as molasses, equivalent to about 42,000 short tons of sugar.

3/ Including 25,000 short tons exported to Anglo-Egyptian Sudan.

4/ In addition there are 51,000 short tons from carry-over stocks.

5/ In addition there is a surplus of 2,000 short tons of dehydrated onions, equal to 17,000 short tons of fresh onions.

6/ Including about 11,000 short tons used for industrial purposes.

7/ Including 28,000 short tons for industrial purposes.

8/ No figures available, but it can be assumed that production and consumption are about the same as in prewar years.

Production of refined sugar from cane is estimated at 188,000 short tons as compared with 158,731 tons, the prewar average. In addition, there is a substantial carry-over stock. Thus Egypt is in a position to supply its domestic demands for this commodity, estimated at 165,000 tons, and have a large exportable surplus.

Before the war, the onion crop was a major export item, the exportable surplus averaging about 143,000 short tons a year. During the war, production was cut down severely. The surplus from this year's crop is estimated at 51,000 tons.

Dry-legume production (mainly beans, fenugreek, and lentils) was good, being slightly over the prewar level and sufficient to meet the country's needs until the coming harvest.

The vegetable-oil situation is satisfactory. Due to the drastic curtailment of the cotton crop, as a wartime measure, production of cottonseed, the main source of vegetable oil, has been reduced heavily. The resulting deficit has been made good by the importation of cottonseed and other oil-producing seeds, mainly from the Sudan. There are at present ample domestic and imported stocks of these seeds to supply Egypt with its needs of oil for food and nonfood purposes until the summer of 1946.

Meat and dairy products are in normal supply. It must be remembered, however, that consumption of these commodities in Egypt has always been low.

Turkey

Summary

The agricultural and food situation in general is good. Grain crops suffered to some extent from drought, but carry-over stocks are sufficient to make up the shortage, and no imports will be needed. With regard to other main foodstuffs, production is sufficient to meet the country's needs and leave exportable surpluses of sugar, dried fruits, nuts, livestock, and fish.

Prewar and Wartime Situation

Turkey, essentially an agricultural and pastoral country, is normally self-sufficient with respect to its basic foodstuffs. Important surpluses of wheat, barley, vegetable oils, nuts, dried fruits, livestock, fish, and eggs were normally exported in prewar times. Imports consisted mainly of some sugar and rice to supplement local production, and all tea and coffee consumed. At the outbreak of the war, trade in these foodstuffs was carried on mainly with Germany, Italy, France, and Great Britain. Germany was the chief factor in this trade, securing in 1939 over 50 percent of Turkey's total exports.

During the war years, this trade activity with Germany declined progressively until it finally came to a standstill. On the other hand, Turkey's sales of foodstuffs to the Allies increased rapidly, especially by means of pre-emptive purchase. The general food situation in the 2 years 1939 and 1940 was good. Crops were good and livestock products

plentiful, and the country had not felt fully the impact of wartime adjustments. In 1941 and 1942 the situation took a turn for the worse. Cereal crops were unusually short because of a combination of three main factors--adverse weather conditions, mobilization of farmers, and requisitioning of draft animals. Also, a severe winter was responsible for the destruction of an unusually high percentage of livestock. Consequently, some shortage of foodstuffs was felt in urban centers during those 2 years.

TURKEY: Production and trade in food products 1934-38 and estimated production and exports 1945-46

Commodity	Estimated production		Apparent domestic disappearance		International trade 1934-38		1945-46
	1934-38	1945-46	1934-38	1945-46	Net imports	Net exports	Net exports
	1,000 short tons						
Wheat	3,742	2,550	3,653	1/ 2,550		89	2/ 11
Barley	2,177	1,174	2,075	1/ 1,174		102	2/ 39
Rye	375	314	350	1/ 314		25	2/ 41
Corn	607	n.a.	604	n.a.		3	-
Oats	241	157	227	1/ 157		14	2/ 22
Grain sorghum	49	n.a.	49	n.a.		-	-
Rice (paddy)	110	n.a.	110	n.a.		-	-
Total grains	7,301	-	7,068	-		233	
Potatoes	189	n.a.	189	n.a.			-
Sugar, refined	67	99	89	99	22		3/
Dry legumes	516	n.a.	513	n.a.		3	25
Raisins 4/						67	44
Figs, dried 4/						34	18
Hazelnuts (unshelled)	80	61	23	33		57	28
Nuts, other "	121	101	121	101	-	-	-
Total nuts 5/	202	162	145	134		57	28
Oil, olive	23	35	18	19		5	16
Oil, other	23	29	23	29	-	-	-
Total veg. oil 6/	46	64	41	48		5	16
Total meat	203	7/	203	7/		7/	
Eggs (dozen)	84,000	7/	84,000	7/		7/	
Milk	2,616	7/	2,616	7/		7/	

n.a. Not available.

1/ Domestic disappearance of these cereals will be much more than is shown by the figures, as the deficit will be made up from large carry-over stocks.

2/ Surplus for export from carry-over stocks.

3/ There may be a surplus of from 22,000 to 28,000 short tons from carry-over stocks.

4/ No figure is available for total production, which may be twice the amount exported.

5/ Estimates are for total production (not production for commercial purposes), including the following nuts: filberts, walnuts, almonds, and chestnuts.

6/ All edible, not including amount used for nonfood purposes.

7/ No figures available, but increase in livestock numbers indicate that production and consumption are somewhat higher than in prewar years.

By the fall of 1943, however, the situation was rectified to a large extent; good crops were harvested, and the Government had better control of the collection and distribution of essential foodstuffs. Further improvements occurred in 1944. Excellent crops were harvested, and livestock was in top condition. During this period of greater food production, large stocks of cereals accumulated, and surplus foodstuffs, especially raisins, figs, and filberts, were exported.

The Situation in 1945-46

The grain crops harvested in the summer and fall of 1945 suffered from drought during the growing season, and production is estimated to be about 20 to 30 percent below the prewar average. The reserve stocks from previous years, however, are sufficient to take care of the country's needs until the coming harvests.

Refined-sugar production is estimated at 99,000 short tons as compared with the prewar average of 67,000 tons. This, together with substantial carry-over stocks, will be sufficient to meet normal local consumption requirements and leave a surplus of about 22,000 tons.

No figures are available for dry legumes, but indications are that production was normal.

For many years dried fruits, mainly raisins and figs, have been important export items. This year the exportable surplus is estimated to be 44,000 short tons of raisins and 18,000 tons of figs.

Hazelnut production was much lower than normal, and the exportable surplus is estimated at 27,500 tons as compared with a prewar average of 57,000 tons.

Vegetable-oil production was substantially greater than the prewar average, and early estimates indicate an available surplus of about 17,000 tons of edible olive oil.

Livestock, which is a major source of food in Turkey, has been in excellent condition for the past 3 years. Consequently, it is expected that there will be ample supplies of meat, dairy products, and eggs. It can also be expected that, as in prewar times, several hundred thousand head of sheep will be available for export.

Palestine

A shortage of cereal production this year will require increased imports. Supplies of citrus available for export are above the average for the war years.

In the course of the past 20 years, agricultural production in Palestine has been increased considerably, to the extent that at present the cultivated acreage amounts to about 35 percent of the total area of the country. In many localities, cultivation is intensive in character. Nevertheless, the country has been a heavy importer of foodstuffs. This disparity between food production and consumption has been due to a tremendous increase in population, partly as a result of natural increase, but mainly because of intensive immigration. The population increased from 1,300,000 in 1935 to 1,800,000 in 1945, or over 46 percent during a period of 10 years.

During the period just preceding the war, the annual net imports of cereals into Palestine averaged about 125,000 short tons; potatoes, 18,000 tons; sugar, 26,500 tons; vegetable oil, 6,000 tons; cattle, 27,000 head; sheep, 230,000 head; goats, 112,000 head; eggs, 12,000,000 dozen, and various quantities of dairy products were imported. The only important export item was citrus fruit. In the 1938-39 season 15,000,000 cases were exported, accounting for about 75 percent of the total value of exports of that country.

During the war years, the authorities exerted considerable effort in the direction of increasing food production. Success was slight in the case of cereals, but appreciable in the case of poultry, dairy products, and vegetables. However, the country continued to depend heavily upon food and feed imports from neighboring countries, and in some cases the shortage was acute. Furthermore, because of war conditions, citrus exportation came practically to a standstill, and production was curtailed drastically.

No definite information is yet available on the various crops harvested in the summer and fall of 1945. Preliminary indications are that cereal crops were below average. Very good potato and vegetable crops were harvested, and supplies of these may be sufficient to care for the country's needs. Production of vegetable oils and dry legumes was about average. A fair citrus crop, amounting to 8.2 million cases, was harvested, of which 6.2 million cases are available for export. Consequently, Palestine will need to import greater quantities of cereals than in normal years. Also, with the exception of potatoes, it will need normal imports of other foodstuffs, especially sugar and livestock.

Iraq

The wartime increases in Iraq production of food crops were maintained in 1945. Large surpluses of cereals and dates are available for export.

With a relatively sparse population that is predominantly pastoral and agricultural, and with abundant water from two large rivers--the Euphrates and Tigris--to irrigate its fertile soil, Iraq normally has been able to produce practically all of its major food requirements and to offer substantial surpluses of dates, grains, livestock, and livestock products for export. The only two important import items have been sugar and tea.

During the war years, in response to a greater world need for foodstuffs, Iraq succeeded in maintaining its normal surplus production in some cases and expanding it considerably in others. Paddy-rice production was increased from 180,000 to 320,000 short tons, and surplus barley supplies available for export reached the high levels of 200,000 and 300,000 tons a year. Surpluses from livestock and its products went a long way in meeting the needs of the Allied forces stationed in this region.

In general, good grain crops were harvested, with wheat and barley falling short of the prewar levels, but with an increase of about 100,000 short tons in rice production. Consequently, on the basis of normal consumption, it is estimated that a grain surplus of over 350,000 tons will be available.

The date crop also was good, and estimated exports of this important commodity will amount to 175,000 short tons.

Livestock is in good condition, promising ample supplies of meat and dairy products for domestic consumption and a possible surplus of a few hundred thousand head of sheep for export.

The only major deficit food item is sugar, of which about 35,000 tons will need to be imported.

IRAQ: Production and trade in food products 1934-38 and estimated production and exports 1945-46

Commodity	Estimated production		Apparent domestic disappearance		International trade 1934-38		International trade 1945-46
	1934-38	1945-46	1934-38	1945-46	Net imports	Net exports	Net exports
	1,000 short tons						
Wheat	527	496	469	441		58	55
Barley	634	717	408	441		226	276
Grain sorghum	139	n.a.	114	n.a.		25	-
Rice (paddy)	180	276	178	254		2	22
Total grains	1,480		1,169			311	
Sugar	-	-	41		41		
Dry legumes	46	94	42	88		4	6
Dates	441	496	249	320		192	176
Oil, vegetable 1/	9	n.a.	9	n.a.	-	-	-
Total meat	51	2/	51	2/	-	-	-
Poultry	3	4	3	4	-	-	-
Eggs (dozen)	14,000	15,000	14,000	15,000			
Milk 3/	331	441	331	441	-	-	-
Tea			3		3		
Coffee			1		1		

n.a. Not available.
1/ Sesame seed in terms of oil.
2/ No figures available but it can be assumed that production and consumption are somewhat higher than in prewar years.
3/ Total milk, including that used for butter and cheese making.

Iran

Good food crops were harvested in 1945. Surpluses of cereals, dried fruits, and almonds will be available for export. Some imports of sugar would be necessary to maintain consumption even at the somewhat reduced level of recent years.

Like its neighbors, Iraq and Turkey, Iran is a predominantly pastoral and agricultural country. In prewar years, its agricultural production consisted mainly of cereals, dry legumes, fresh and dried fruits, sugar beets, and livestock products. This production was in general sufficient to meet the country's requirements of food and feed and leave an exportable surplus of some 90,000 short tons of cereals, 16,000 tons of raisins, 30,000 tons of dates, and over 3,000 tons of shelled almonds. The only important deficit food items were sugar and tea.

Due to a variety of factors, this normal and favorable balance between production, consumption, and trade in foodstuffs was disrupted during the first half of the war period. Food shortages were felt keenly

in urban centers, and imports had to be made from the regional stock pile under Allied control. However, by 1944 production had been restored to the prewar level in some cases and increased in others, and collection and distribution of foodstuffs were put under more efficient control.

The grain crops harvested this year were good, showing an increase of about 75,000 short tons over the prewar average. Consequently, the exportable grain surplus is estimated at over 110,000 tons.

Production of beet sugar has been on the increase since before the war. The beet crop this year is estimated to produce some 28,000 short tons of raw sugar, as compared with an average of 17,000 tons for 1934-38. It is estimated that about 50,000 tons would need to be imported, however, to maintain domestic consumption at a level slightly below the prewar average.

Dried-fruit production in 1945 was about normal, leaving an exportable surplus of 15,500 short tons of raisins and 36,000 tons of dates. Almond production was slightly below normal, but about average supplies will be available for export.

Livestock is in good condition, promising ample supplies of meat and dairy products.

IRAN: Production and trade in food products 1934-38 and estimated production and exports 1945-46

Commodity	Estimated production		Apparent domestic disappearance		International trade		
					1934-38		1945-46
	1934-38	1945-46	1934-38	1945-46	Net imports	Net exports	Net exports
	- - - -		1,000 short tons		- - - -		
Wheat	2,228	2,315	2,202	2,282		25	33
Barley	874	1,378	860	1,356		14	22
Rice (paddy)	467	454	418	392		49	63
Total grains	3,568	1/4,147	3,480	4,029		88	118
Sugar, refined	17	28	93		76		
Dry legumes	165	n.a.	166	n.a.	-	-	-
Raisins	39	37	22	21		17	16
Dates	133	149	103	113		30	36
Dried fruit, other	32	44	26	44		6	-
Almonds (shelled)	8	7	4	4		4	3
Nuts, other (unshell)	6	n.a.	4	n.a.		2	-
Oil, cottonseed	8	6	8	6		-	
Oil, other 2/	6	n.a.	6	n.a.	-	-	-
Total veg. oil	14	n.a.	14	n.a.		-	-
Total meat	197	3/	197	3/	-	-	-
Eggs (dozen)	53,000	3/	53,000	3/	-	-	-
Milk	1,235	3/	1,235	3/	-	-	-
Tea	1	3/	9	3/	8	-	-

n.a. Not available. 1/ In addition to carry-over stocks estimated at 80,000 short tons of wheat, 46,000 s. tons of barley, and 28,000 s.t. of rice.
2/ Including sesame seed in terms of oil.
3/ No figures are available, but it can be assumed that production and consumption are about the same as in prewar years.

INDIA AND THE FAR EAST

Summary

The marked decline in the 1945-46 output of rice in the surplus producing areas has resulted in a very tight food situation in all of the countries depending upon rice imports for part of their food supply. In addition, food production in many of the importing countries, is much below prewar, thus increasing the dependence of these areas on food imports. Since only a small part of the shortage of rice can be made up by other food hunger and starvation in this area are likely to be much more prevalent than usual during 1946.

The countries most dependent upon imports of food during 1946 will be the Philippines, Ceylon, Malaya, and Japan. In the Philippines, food production has declined even more than in Japan. No sugar and only small amounts of vegetable oils, the Philippine principal export crops in normal times, will be available for exports during 1946, and large imports of cereals, dairy products, fish, and even some sugar will be needed if reduced wartime rations are to be met. Considerable supplies of foodstuffs are being provided from the United States and some rice will be shipped from South America, but food supplies are likely to continue short for at least another year until domestic production can be expanded or supplies obtained from other countries in this area.

Although Malaya's food production was slightly expanded during the occupation period because of wartime necessities, it will nevertheless require large imports of rice. On the other hand, it is most likely that exports of copra and other agricultural export crops will be resumed during 1946.

In Japan, which normally imported nearly 20 percent of its food supply in prewar years, the 1945-46 output of food is reported to be about 22 percent below prewar, and the population has continued to increase. The Japanese food position is further aggravated by the disruption of transportation facilities and the deterioration of the methods of collecting food from farms so that the supplies of food available to the urban population from domestic sources is estimated to be less than half of the prewar consumption and much below minimum requirements for maintaining human life. It is, therefore, apparent that substantial quantities of food will need to be imported if a serious food crisis is to be averted.

Recent deterioration of winter crops in India has greatly increased the seriousness of the food situation for 1946 in that area. While total food production will be about equal to the prewar average it will be somewhat below the level of the past 2 years when relatively favorable crops were harvested. The situation appears most serious in Southern part of the country, which is normally a deficit area and the gravity of the situation is increased by the shortage of rice in the areas which normally export to India.

The Netherlands Indies food production declined and some imports are needed to take care of the food deficit. The reconstruction and rehabilitation of the great agricultural export industries has been delayed by the political strife between the Nationalists and Dutch Authorities. The only food crop of which the Indies seem to have a surplus stock is sugar, but the amount is uncertain. At any rate no sizable quantities have yet left the Island of Java.

Average annual exports of milled rice from Burma, Siam, French Indochina, Korea, and Formosa, in the prewar years, amounted to about 8,000,000 tons, or approximately 90 percent of the rice entering into international trade. In all of these countries, production for 1945-46 has declined sharply below prewar, and only comparatively small quantities of rice will be available for export from the current crop. Some carry-over of rice is available in these countries, however, and while it is much less than average prewar yearly exports, it will aid in meeting the short rice situation this year.

In China the food supplies are spotted, and as usual, some areas are in short food supply. The over-all production is slightly below prewar but is about the same as the average of recent years. It is estimated that about 1,350,000 tons of cereals will be needed in addition to the food supplies being shipped in by UNRRA in order to meet the needs of large cities and other areas of short food supply. It is doubtful, however, if more than the most urgent food needs of these countries can be met, because of the shortage of cereals in surplus producing countries of this area and the difficulty in shipping and other facilities for moving food supplies from other areas of the world where available supply is severely pressed to meet the also urgent need of Europe and other deficit areas.

Since the rice crop in most of the area is harvested from April to December except in Java, where the bulk of the crop is harvested from April to August, a tight food situation will contine to exist through 1946. Some local relief may be brought about by an expansion of the dry season crop acreage but such relief is likely to be very slight. The first real relief will come as a result of the 1946-47 rice crop. While we can expect some increase in production in the deficit areas, especially the Philippines and Japan, the best prospect for an improvement of the food situation is an expansion of the rice acreage in the surplus producing countries, Burma, Siam and Indochina. Although some expansion may be expected, a number of factors will prevent a complete recovery as early as 1946 in these three countries. These factors are shortage of consumer goods, work animals, and laborers, lack of stable currency because of pegged exchange rates, disruption of transportation facilities, and deterioration of the milling industries. In such areas, Korea, Japan, and Formosa in China, an improvement of the rice crop will depend heavily upon the availability of fertilizer, which is in very short supply in these areas. Expansion of output of other products important in international trade will be retarded by the same factors, although supplies of vegetable oils should become available sooner than rice and sugar.

India

Summary

Food supplies from domestic sources in India during 1945-56 is not expected to differ greatly about the same as the prewar average, but, because of the rapidly increasing population, supplies per capita will be somewhat smaller. During the early part of the season crop prospects were fairly favorable, but recent dry weather, particularly in the southern part of the area, has resulted in deterioration of the winter crops and has caused some concern about food supplies for the coming year. It is estimated that considerable imports will be needed in the next few months in order to avoid acute shortages in some of the worst stricken areas. Because of the short supplies of food in the areas normally exporting to India, however, the amount of food available to meet these shortages is much less than usual and a tight food situation is in prospect.

Prewar and wartime situation.

In prewar years India was largely self-sufficient in food products. About 3 percent of the total cereal consumption was derived from imports and small quantities of edible oil seeds were exported. Over two-thirds of the total food consumed, in terms of calories, was in the form of cereals, with rice alone providing about one-third of the total food supply. Wheat is the second most important cereal, providing about 10 percent of the total calories consumed, and millets of various kinds, barley, and corn are also widely used as food. About 5 percent of the prewar consumption of rice and 6 percent of the wheat was imported.

Gram (chickpeas) and other beans and peas were an important source of protein foods in India and provided nearly 10 percent of the total calories consumed. India was the world's largest sugar producer and was practically self-sufficient, the domestic supply providing about 8 percent of the total food. About 5 percent of the total food production was in the form of edible vegetable oils, but about 10 percent of this output was exported before the war. Livestock products and fish provided only about 8 percent of the food consumed and most of this was in the form of dairy products.

India is perpertually in short supply of food and there are nearly always some areas on the verge of famine. The problem of procuring food grains from surplus producing areas is difficult, as the marketable surpluses are made up of small lots from millions of producers, and transportation facilities are limited. As a result, most areas are self-sufficient in food, and imports are used largely to meet shortages in large cities and in areas where food output is below average.

When foreign rice supplies were cut off in early 1942 by the Japanese occupation of southeastern Asia, the Government of India adopted a program to increase the domestic production of food products, to meet emergencies. Food production was expanded by: (1) increasing the total area under cultivation; (2) devoting a larger percentage of the cultivated area to food crops;

area; (3) increasing the area under double cropping; (4) extending the use of fertilizers; (5) increasing the supply of irrigation water; and (6) encouraging the use of improved seeds. Very little progress was made in increasing the area under cultivation with supply of irrigation water and fertilizers or in improving yields by use of better seeds, but nearly 5 million acres of land were diverted from cotton to millets, and nearly 1 million acres formerly planted to jute were diverted to rice, and the area devoted to double cropping was extended about 3.5 million acres.

The expansion in acreage at average yields would provide an additional quantity of about 2 million short tons of cereals. During the war this was enough to offset the loss of foreign food supplies but it was not sufficient to provide food for the expanding population and to meet the increased wartime demands resulting from the higher level of industrial activity and the large military demands for food. As a result, total food supplies in India during the war have not been sufficient to maintain per capita civilian supplies at prewar levels, and serious food shortages have been avoided only by higher than average yields of food crops, and careful utilization of existing supplies.

Outlook.

Food production in India in the 1945-46 season (approximately May to April) may not be greatly different from prewar due to the recent deterioration of winter crops which includes the major rice crop. The wheat crop was above average and the acreage in rice and millets is above prewar but production has not yet been officially estimated and the effect of the drought is not definitely known.

The outlook for total rice production in Bengal, the principal deficit area, has improved somewhat in recent months. On the other hand, hurricane and drought damage has reduced the rice crop in the Southern part of the Deccan peninsula and it now appears that the crop in this area will be somewhat smaller than in 1944-45.

Ceylon

A serious drought in Ceylon during the first half of the year sharply reduced domestic food production for 1945. The output of rice, which is the staple food of the majority, was only about two-thirds of the normal crop, so that the people in the area where crops were a failure, as well as those ordinarily obtaining the rice supply through imports, will be dependent upon imports through most of 1946. Because of the shortage of rice supplies in the normally exporting areas of southeastern Asia, Ceylon has had to turn to Egypt and Brazil for its imports of rice during the current season. These areas have better than average supplies in prospect, and efforts are being made to maintain the Ceylon ration during 1946 at about the same level as that prevailing in 1945, which was much below the prewar ration. During November and December, however, supplies were insufficient to meet these rations and some wheat had to be substituted for rice.

Ceylon normally specializes in the production of tea, rubber, and coconut products, and imports the major part of its food supplies. Rice is the staple food of the natives, and prewar consumption amounted to about 1.1 million short tons of which nearly three-fourths was imported. About 60 percent of the imports came from Burma and the remainder from India, Siam, and French Indochina. With the outbreak of the war in the Pacific, most of the supplies in these areas were cut off, and a serious food problem developed. During the war years, rice rations were limited to about three-fourths of prewar consumption, and the Government of Ceylon encouraged the expansion of domestic production. The expansion in output was small, however, and the Ceylonese population continued to depend largely on imports for its food supply. Because of the shortage of shipping and difficulty in obtaining rice elsewhere, the food position has been critical. The marked curtailment of food production during 1945 has further increased the seriousness of the food situation and increased the island's dependence upon imported supplies.

Burma

Summary.- Preliminary estimates of the 1945-46 rice crop indicate that Burma, normally the world's leading rice exporting country, will not have an exportable surplus this year, but may even have a small rice deficit. Whatever rice will be exported during 1946 would therefore have to come out of old stocks from last year's crop.

Prewar and wartime situation.- Prior to 1942 Burma was the world's largest rice exporter the exports averaging 3,250,000 short tons during the 5-year period 1936-40. Approximately 75 percent of the rice normally went to India, Ceylon, and British Malaya. Other important food products produced in Burma were corn, millet, beans, peanuts, and seasame; but rice was practically the only product for which there was an exportable surplus.

The Japanese invasion affected rice production primarily by depriving Burma of its markets. Large areas formerly planted with rice went out of production and became overgrown with bush vegetation and grasses. Rinderpest and Japanese requisitioning reduced work animals by an estimated 50 percent, so that there is at present a need for additional animals before rice production can be increased substantially.

Outlook.- The acreage planted to the 1945-46 rice crop is estimated to be only about one-half that of the 1941-42 acreage, the last prewar crop. Preliminary estimates report a total production of 3,900,000 short tons of rough rice, which would give a total of 2,300,000 tons of clean rice, after deduction of seed requirements. Burma's normal domestic consumption is estimated at 2,400,000 tons, which would leave a deficit of about 100,000 tons.

The rice production of Lower Burma will be in excess of local demands, but Upper Burma will depend heavily upon the surplus of the south. It may, however, be difficult to move the required quantities of rice to Upper Burma, due to present lack of transportation facilities.

Both the sesame and peanut acreage has declined considerably from prewar levels. The sesame crop is estimated at 22,000 short tons against 56,000 tons during the period 1937 to 1941, the peanut crop is estimated at 106,000 tons, compared with 218,000 tons in 1940. Because of these declines in area and production, Burma is reported to require some 45,000 tons of edible oil during 1946.

The present forecast for the 1946-47 rice acreage is 8,000,000 acres compared with 6,630,000 acres for 1946. In 1935-39 the acreage averaged 12,700,000 acres. Shortage of work stock, lack of labor and implements, and the amount of work required to bring abandoned fields back into production are retarding the return to normal acreage.

Malaya

British Malaya, traditionally depending upon imports from Siam, Burma, and Indochina for 60 to 70 percent of its staple food, rice, is reported to require some 500,000 short tons of rice during 1946 compared with average imports of some 800,000 short tons during the 5-year period 1935-39.

Although it cannot be stated at this time how much rice will be allocated to Malaya, it seems to be unlikely that the country will receive the requested quantity.

Late in 1945, rice rations had to be reduced from 14 ounces a day per person to 12½ ounces; while the ration for Japanese prisoners was reduced from 12 to 8 ounces a day. The Japanese occupation authorities had reduced rations to as low as 5.68 ounces a day for an adult male.

Because of the shortage of rice and the necessity to consume all available rice supplies for the urban population, a recent order prohibits the distribution of rice in rural districts since December 17, 1945.

Siam

Preliminary reports on the 1945-46 rice crop state that the production is considerably below prewar level of about 4,800,000 short tons. Current domestic consumption, allowing for growth in population, is reported to amount to about 2,900,000 tons. Since the crop has not yet been estimated, it cannot be stated at this time whether Siam will have a surplus this year. But in any case, if there is a surplus, it will be much below prewar years.

Siam has, however, a stock pile of old rice, but the exact amount remains to be determined. Estimates range from 500,000 to 1,500,000 tons. Under the provisions of the treaty between Great Britain and Siam, signed at Singapore on January 1, 1946, Siam is required "to make available free of cost ... a quantity of rice equal to the accumulated surplus rice at present existing in Siam, subject to a maximum of one and a half million tons."

Prior to 1942 Siam was, after Burma, the most important of the world's rice-exporting countries. It exported slightly more than 1,500,000 short tons of clean rice annually during the 5-year period 1936-40, more than 75 percent of the exports going to Asiatic markets, principally the Straits Settlements and Hongkong.

In addition to rice, Siam produced such foodstuffs as coconuts, corn, pulses, and oilseeds; but rice is practically the only food crop for which there was an exportable surplus. Although Siam imported fish, canned milk, and sugar, it can be considered self-sufficient in foodstuffs.

The war and the resulting lack of export markets and shipping space caused a decline of the Siamese rice acreage. Japan's surrender did not occur early enough to bring about an increased crop acreage in 1945-46. Lack of farm animals and labor and an abnormally heavy rainfall in the central part of Siam at the beginning of the planting season adversely affected the rice crop, the harvest of which will be finished by late February of this year.

CHINA

Summary

Food production in China in 1945 was only slightly below the average of war years but was somewhat below the prewar average. Local shortages of food have been reported, but no extensive food shortages are in prospect. The greater-than-usual shortage of transportation facilities for moving food from surplus to deficit areas, is offering the most serious problem. UNRRA is providing some food and other necessities but lack of transportation facilities is limiting the movement of food into the interior deficit areas. It is estimated that 1,350 million tons of foodstuffs, mostly cereals, will be needed in addition to the supplies being furnished by UNRRA. Because of the shortage of foodstuffs in the Far Eastern area, and the prevailing controls of foreign exchange in China, it is doubtful if the shortage will be fully met.

Production of soybeans in Manchuria during the latter part of the war period was reported to be about half of prewar production, and a large part of the acreage formerly in soybeans is assumed to have been planted to other food crops. Because of the decline in soybean production, only small amounts will be made available for export, at least before the 1946 crop becomes available. In Formosa, the rice crop has been reduced to about half of prewar, and sugar production has been curtailed approximately 85 percent. While this area normally exports large quantities of rice and sugar, the supplies of rice this year are only about equivalent to normal prewar consumption.

The end of the civil war as well as of the war with Japan and the help being furnished to China to regain normal production are favorable factors in the food situation for 1946. It is probable, however, that fertilizer supplies will continue short and only a partial recovery will be made toward the prewar production of soybeans in Manchuria and rice and sugar in Formosa.

Food Situation in Reunited China - Since the cessation of hostilities, the various segments of China have been combined under one government. This report includes the 15 Free Provinces, 24 Provinces of prewar China, the 7 provinces formerly occupied, and Manchuria and Formosa. China thus comprises about 3.8 million square miles and contains an estimated 481 million people in 1940.

CHINA * - Production, apparent domestic disappearance and international trade of principal food products, average 1931-37 and estimated production 1945.

	Production		Domestic	International trade 2/	
	1931-37 average	1945-46 1/	utilization 1931-37 av.	1933-37 Net Imports	1933-37 Net Exports
	-Thousands of short tons-				
Wheat	25,053	27,254	25,556	478	-
Wheat flour	-	-	447	440	-
Barley	8,677	8,507	8,663	-	1
Oats	971	915	971	-	4
Rice, paddy	57,458	50,211	57,533	-	82
Kaoliang	12,111	11,593	11,948	-	90
Millet	10,489	9,846	10,311	-	193
Proso-millet	1,742	1,606	1,742	-	-
Corn	9,186	9,902	9,085	-	49
Other cereals	1,486	1,087	1,452	-	35
Crops on reduced soybean acreage	-	2,000	2,000	-	-
Peas	3,517	3,471	3,510	-	15
Broad beans	3.327	3,120	3,280	-	-
Soybeans	11,346	8,691	9,022	-	2,168
Other beans	394	343	203	-	214
Sweet potatoes	23,350	28,336	23,201	-	168

* China according to present recognized boundaries - including Manchuria and Formosa.

1/Preliminary.
2/Trade between the 22 provinces, Manchuria and Formosa was considered as domestic trade.

For all China, food production in 1945-46 was slightly below the average of recent years. A good wheat and corn crop was harvested, and production was above the prewar average. The output of the other cereals was below average, but this does not include the crops grown on land in Manchuria, formerly planted to soybeans, on which an estimated 12,000,000 tons of food was produced. If this food was largely kaoliang and other coarse cereals, which are the principal food crops of Manchuria, then the output of all cereals except rice was above average. Current rice production in the 15 Free Provinces of China where wartime statistics are available, was slightly below the 1944 average.

In prewar years the various segments of China imported 917,954 short tons of wheat, wheat flour, and other flour. Imports of polished rice, chiefly in Kwantung Province, amounted to 731,896 tons, but Formosa exported 788,910 tons, chiefly to Japan. Net exports were about 2,381,902 tons of beans, mostly soybeans, and about 445,000 tons of coarse cereals.

Minimum import requirements in addition to foodstuffs to be shipped by UNRRA, are estimated at 1,350,000 short tons as follows: 600,000 tons of rice (400,000 tons for Kwangtung); 600,000 tons of wheat, and 150,000 tons of wheat flour.

Difficulty of transportation from interior producing areas to coastal cities is the reason for a requirement greater than prewar. However, present Chinese exchange controls probably would not make available United States exchange for any large purchases, and these controls will probably continue through 1946.

Acute deficit areas reported are chiefly in Kwangtung Province and certain interior places such as Honan. Reports regarding Shanghai indicate a rice supply sufficient to most consumption needs but insufficient wheat and wheat flour.

Distribution of imported foodstuffs to interior places such as Honan Province will depend upon the rapidity of restoration of transportation facilities, but such restoration appears improbable for 1946.

Prewar and Wartime Situation in the 22 Provinces.- In prewar years, most of the food products consumed within the 22 Provinces for which crop reports were available was domestically produced. These provinces of China produced a crop of wheat larger than that of the United States and a rice crop twice as large as her wheat crop. Other important food crops were barley, kaoliang, millet, corn, soybeans, field peas, broad beans, and sweet-potatoes. Food crops, for which no production reports are available but which provide a significant part of the total food supply, were peanuts, rapeseed, sugarcane, and sesame. Other less-important food crops that are not included are Irish potatoes, carrots, and squash, as well as all

vegetable gardening production.

Even in normal times, severe shortages may occur in one area or another and sometimes covering several provinces. This is especially true of North China Provinces, and more particularly the northwestern Provinces where rainfall is limited and irregular. Lack of modern transportation facilities makes it impossible to bring in supplies to some of these areas or to ship out surpluses.

Imports of wheat amounted to about 2 percent of the wheat crop, and rice imports equaled to 1.5 percent of domestic production. Wheat was imported for flour mills at port cities, chiefly Shanghai, not because China did not have wheat, but because of standardization of foreign wheat and greater ease in purchasing and transporting. Kwangtung Province, in which Canton is a port city, is chronically short of rice and imported rice from Indochina because of convenient transportation. The opening of the Canton-Hankow railway through the surplus rice region of Honan Province, early after the Japanese attack on China, began to make available to Canton rice from Honan. Resumption of traffic on this railroad is planned, which should ease the food shortage in Canton considerably.

The war did not affect the food supply as greatly as one might expect. Japanese occupation of a whole region was fairly rapid. Moreover, the bulk of food products are consumed in or near areas of production. There were, of course, temporary shortages caused by battles or tying up of transportation for military operations. Japanese collection of iron and iron parts of implements also restricted production somewhat. Breaching of the Yellow River dyke in Honan in 1938 by Chinese armies to stem the Japanese advance, laid waste some estimated 2 million acres of cropland in Honan and northern Anhwei. The greatest food shortage occurred in 1943 in Honan Province of Free China because of a drought and Chinese military requisition. During the last stages of the war acute shortages occurred in parts of Kwangsi, Kweichow, and Honan because of Japanese activity.

China has chronic partial unemployment in rural areas and no evidence has been presented of a shortage of labor reducing production, except in a very few local areas. Inflation, if anything, encouraged agricultural production, because of rapidly rising prices and a lag in costs such as labor, cash rents, and taxes. Shortage of animals occurred in many areas due to slaughter by the Japanese.

In Free China Government efforts had a part in maintaining production by means of new irrigation projects, distribution of improved seeds, more extensive winter cropping, control of insects, and production of serum to control rinderpest of cattle.

Prewar and Wartime Situation in Manchuria and Formosa; Japanese reports on Manchurian production for 1945, obtained during the war, indicate a decrease of about 10 percent from the 1935-38 estimated average production of 18,060,00 short tons. The chief effect of war on the agriculture of Manchuria was the reported decrease in the area planted to soybeans of about 50 percent of the 1931-1937 average. Decreasing export markets and need for more grain for domestic consumption appear responsible for this change. From 1933 to 1937 Manchuria exported 2,165,955 short tons of soybeans annually, chiefly to Japan, but also imported 332,951 tons of wheat and other flour from Australia and Japan. The apparent change to more grain prodution might reduce for 1945-46 the import requirement for wheat flour.

In Formosa the chief effect of the war was a reduction in the use of commercial fertilizer. Normally, Formosa's fertilizer supply consisted of 290,00 short tons imported from Japan and 40,000 tons domestically manufactured. By 1945 war conditions prevented imports of fertilizer.

Formosa's rice production for 1945 was only 55 percent of the 1931-37 output, the reduction resulting both from the cutting off of imports of fertilizer and from unfavorable weather. Sugar output in 1945 was about 85 percent below prewar, due to a decrease in the production of cane and severe destruction of sugar mills.

1946 Outlook.- The end of the war, the truce between the Communists and the National Armies, and UNRRA activities in China are favorable factors for nearly maintaining production of foodstuffs in China during 1946.

Food-crop acreage will continue to be augmented, as cotton acreage will not yet be brought up to former levels. Soybean acreage in Manchuria will probably increase but will most likely not return to prewar levels in 1946. Shortage of fertilizer will continue to affect 1946 rice production in Formosa.

Japan

Summary.

The end of hostilities found Japan in a difficult food situation. In the months since then, Japan's food outlook has become even more difficult, largely as a result of the unfavorable weather for the 1945 rice crop. With the loss of the food imports from areas formerly under its domination, the country is entirely dependent on its own food resources and on such imports as it will be permitted to receive.

Even when Japanese production was at its peak, the country imported a considerable part of its food supply. With the deterioration of production facilities during the war, because of the lack of fertilizers, manpower, and farm tools, and the exceptionally poor growing conditions in the fall of 1945, production of food products in that year was from 20 to 25 percent below prewar. The almost complete cessation of imports since the end of hostilities, combined with the decline in production and the increase in population, due to natural increase and repatriation from other areas, has reduced the per capita food supplies sharply below even the wartime rations. Unless Japan is permitted to import sizeable quantities of foodstuffs in the spring of 1946, the urban population is likely to undergo one of its worst food shortages.

The decline in Japanese food supply is illustrated by the following changes in the calories available for consumption from prewar to date. The per capita intake in Japan before the war was slightly over 2,300 calories daily, of which about 1,800 were obtained from domestic production. By 1944 consumption had declined to 2,200 calories, and only 1,620 were provided by domestic output. Further cuts in the rations during the summer of 1945 reduced per capita consumption to about 2,000 calories, and it is estimated that 1945 production of food products will provide only about 1,400 calories per capita. The food situation is further aggravated by the maldistribution between urban and rural consumers. It is probable that farmers will consume approximately 2,300 calories per capita, which would leave available to the nonfarm population only about 900 calories from domestic production, or less than one-half of the prewar consumption from domestic sources and imports.

Prewar and Wartime Situation.--Before the war Japan proper was a deficit food producer and depended upon imports for approximately 15 to 20 percent of its food consumption. A sixth of its rice, the main food, was imported. Most of it was supplied by Korea and Formosa, at that time under Japanese control. About 70 percent of the soybean requirements likewise had to be imported from Manchuria. In addition, over three-fourths of the sugar consumed was imported from Formosa. It was only by virtue of these substantial imports from the areas under Japanese control that Japan proper achieved self-sufficiency in foodstuffs before the war.

Because of the shortage of food, several products not heretofore used as food, are being specially prepared for consumption. Products such as acorns, silkworms and locusts, refuse from the manufacture of industrial products, vegetable leaves, and other byproducts of agricultural production are dried and ground into flour and are expected to provide 150,000 short tons of food during 1946.

The problem of food collection has become increasingly difficult since the end of hostilities, and collections during the early part of the 1946 season amounted to only about one-fourth of last year's collections. As the seriousness of the food situation increased, black-market activities expanded rapidly. The disruption of transportation facilities, due to bombing in the late stages of the war, the shortage of consumer goods to exchange for food products, and the uncertain value of paper money have all contributed to the difficulty of collecting food products from the millions of small farmers. These farmers, normally under-fed, are more inclined under present conditions to reserve sufficient food for their own needs. By selling their small surpluses through the black market at high prices they are able to obtain enough money to buy the limited products available and to meet other expenses while obtaining other goods through barter. Because of these conditions, it is estimated that farmers are maintaining their diet at about prewar levels, while the food available to the urban population is less than half that of prewar.

The estimated needs for food for Japan range from 3 to nearly 5 million tons, depending upon the diet that is used as the minimum necessary to avoid disease and unrest. If an average of 1,800 calories per day is used as the minimum requirement, more than 4 million tons of food would be required to bring the Japanese diet up to this level. The most urgent needs are rice or wheat, sugar, and fats. The acute food situation has been recognized by the Allied Supreme Command and the Japanese Government has been granted permission to import food. The amount which may be imported has not yet been indicated by the Allied Powers. The seriousness of the food situation in other areas of the world and the limited supplies available to meet these needs, as well as Japan's ability to pay for imported foodstuffs are factors that will enter into the determination of imports.

JAPAN: Production and trade in food products, 1932-36 and estimated production 1945-46 by major commodity groups

Commodity	Production		Domestic production available for food		Net imports
	1932-36 average	Estimated 1945-46	1932-36 average	Estimated 1945-46	Average 1932-33 1935-36
	1,000 s.t.	1,000 s.t.	1,000 s.t.	1,000 s.t.	1,000 s.t.
Rice, brown	9,924	7,102	7,840	6,236	2,013
Wheat	1,288	1,236	915	878	110
Barley	1,696	1,504	1,373	1,009	6
Millet	193	225	82	90	-
Sugar	222	30	222	30	817
Potatoes	1,431	2,687	1,150	2,421	-
Sweet Potatoes	3,822	6,860	3,286	4,505	-
Soybeans	366	403	296	1/ 355	579
Other beans & peas	322	180	194	144	120
Fresh vegetables	7,464	6,565	6,493	5,347	-
Fruits	1,294	554	1,035	443	-
Peanuts (in shell)	14	24	13	22	-
Total meat & eggs	377	76	376	61	-
Milk	270	83	270	83	-
Fish	6,253	2,687	3,238	1,249	-
Aquiculture	169	165	67	66	-

1/ Includes 242,000 short tons crushed for oil.

The war imposed new and heavy burdens upon Japan's food supply system. The domestic food production and distribution were affected adversely by the shortage of manpower, draft power, fertilizer, farm equipment, and transportation. At the height of Japanese expansion, ample food supplies were available, but the armed might of the United States brought the war closer and closer to the heart of Japan, gradually cutting off food supplies from outside sources. Domestic rice output could not be maintained at prewar average levels, much less increased, although there was some increase in potato production, which tended to offset, at least in part, the decline in rice. The fish catch, the principal dietary source of animal protein, was cut from 3,000,000 short tons(1936) to half that amount in 1944, due to shortages of manpower, fishing craft and war-related hazards.

At the same time, obtaining food supplies from the occupied areas became increasingly difficult, and in some cases impossible, as the tide of war turned against Japan. The sugar supply was affected seriously by the difficulty of shipping from Formosa and the outright loss of the sugar-producing South Sea Islands. By 1945, rice imports from Korea also were materially reduced, because of the tight food situation in that country. Soybean shipments from Manchuria were about the only relief to the Japanese food shortage just before hostilities ceased.

1945-46 Food Situation.-- The end of hostilities found Japan's food reserves practically depleted and the country completely dependent upon its own inadequate food production. In addition to damage from typhoons and floods during September and October, unusually cold and wet weather during the latter part of the rice growing season reduced rice yields almost 20 percent below earlier expectations. Total rice output was only about 72 percent of prewar. Sugar production was reduced to 13 percent of prewar, output of most other crops also was below the 1932-36 average (see attached table). Potatoes and sweetpotatoes were about the only crops showing a marked expansion as compared with prewar years. Supplies of livestock products and fish also were sharply reduced and provided less than one-half as much food as was obtained from these products in prewar years.

The food situation for 1945-46 is further complicated by the increase in population. It is estimated that the population at the beginning of 1946 totaled 77 million compared with about 72 million before the war. Most of this increase was due to the high birthrate of the domestic population, but part of it results from the return of Japanese from overseas. During the war years, several million soldiers were stationed in occupied areas and were living largely on food grown in these areas. The return of these soldiers and of civilians from outside of Japan proper, will continue during 1946 and will add to Japanese food needs.

Philippines

Summary.- The Philippines are faced by a serious food deficit during the consumption year 1946, and their dependence upon imports will be considerably larger than in normal prewar years. Preliminary estimates indicate a decline of some 40 percent in the production of rice, the staple food of the majority of the population. Rice import requirements reportedly amount to 385,000 short tons. These may have to be augmented by imports of wheat flour and corn. In addition, the Islands will need, among other things, considerable quantities of fish, meat, and dairy products.

The Islands will not, on the other hand, be able to export a single ton of raw sugar - on the contrary, production will be only a fraction of prewar domestic consumption; so that sugar has been allocated from United States stocks to at least take care of the needs of hospitals and similar institutions. Copra is the only foodstuff of which the Islands have an exportable surplus. The size of copra exports in 1946 will depend, however, upon the reconstruction of island and inter-island transportation facilities as well as the availability of incentive goods.

Prewar and wartime situation.- Although the Philippines exported large quantities of sugar and coconut products in prewar years, the country was not entirely self-sufficient in food, not even in its staple foods of rice, corn, and fish. Consequently, the Islands imported rice, corn, wheat flour, fish, meat, and dairy products - to mention only the leading foodstuffs in the list of imports. The prewar production and trade in food products is summarized in table 1.

Table 1.- PHILIPPINES: Production, net trade and domestic utilization in major foodstuffs, 1935-39 average

(Thousands of short tons)

Commodity	Production	Net imports	Net exports	Domestic utilization
Rice, clean	1,576	57		1,633
Corn	479	6		485
Wheat flour	-	95		95
Sweet potatoes	224			224
Cassava	83			83
Meat products	265	4		269
Dairy products	not available	24		-
Fish products	187	33		220
Copra	1/ 686		1/ 309	-
Coconut oil	1/ 226		1/ 179	47
Sugar, all types	1,127		888	239

1/ 1935-38 average.

During the Japanese occupation, the production of export crops was drastically reduced, and even the production of rice fell off considerably as a result of guerrilla activities in some areas and the abandonment of easily accessible farm land by farmers fearful of Japanese methods of collecting rice and other foodstuffs. A further important factor was the loss of an incentive to produce more than family requirements because of scarcity of consumer goods.

The disruption of inter-island shipping made the movement of foodstuffs from surplus to deficit areas difficult, if not virtually impossible. As a result, areas which had concentrated on the production of export crops, above all sugar, cocoonut products, and fiber, and were dependent upon imported foodstuffs, were forced to expand production of food crops for local consumption in order to prevent hunger. This explains why reports coming out of the Philippines prior to liberation and immediately thereafter indicated that the production of root crops, such as sweet potatoes, cassava, and other minor crops, as well as vegetables, was greatly expanded between 1941 and 1944.

Agricultural conditions greatly deteriorated during the liberation period between October 1944 and August 1945. A great many factors contributed to this. Large parts of the Islands were seriously affected by intensive and prolonged fighting which caused heavy losses in livestock and farming implements. Extensive areas of crop land, both in lowland and upland districts, were abandoned in those Provinces into which the Japanese military forces withdrew. The considerable demands made by the United States Army upon local manpower drew a high percentage of laborers from the farms, which both created a labor shortage and raised the cost of labor.

Outlook.- The late beginning of the rainy season plus the lack of sufficient rain last summer reduced both area and yield of the 1945-46 rice crop. On the whole, upland rice areas were more seriously affected than lowland rice areas. Where farmers realized that, because of the deficiency of labor, work animals, implements, seeds, and water, they could not handle all of their crop land they selected the best land and that least subject to the irregularities of the rainy season.

Because of all of these factors attributable to war and rainfall conditions, the 1945-46 rice crop that is harvested is estimated to be 40 percent below the prewar average, although the rice area may have declined only 20 percent, and may amount to only approximately 1,000,000 short tons against a 1935-39 average of 1,576,000 tons of cleaned rice.

The outlook for domestic supplies of sugar, fish, and meat products is even less favorable than for rice. Not only was a very large percentage of the sugar milling equipment destroyed during the war, but the area under sugarcane was so greatly reduced that the 1945-46 milling season will probably produce only some 14,000 short tons of raw sugar and 24,000 tons of muscovado and panocha sugar (i.e. brown sugar produced by primitive mills), compared with a 1935-39 average production of about 990,000 tons of raw and 60,000 tons of muscovado and panocha sugar. Prewar average domestic consumption amounted to 100,000 tons of raw sugar and all of the

muscovado and panocha sugar.

In prewar years inland and marine fishing supplied the country with an estimated 190,000 tons of fish, but the destruction of most of the boats and fishing gear greatly reduced the quantities landed currently, and it will probably take several years before the fishing industry will recover from the setback caused by the war.

The Islands lost a large percentage of their livestock, which has drastically reduced the quantities of meat and other animal products available for consumption. Losses of carabaos have been estimated at 52 percent, cattle 62, pigs 65, and chickens 75 percent. The reduction in the number of carabaos and cattle is especially serious because loss of animal power affects agricultural production. It will take several years before the losses will be replaced and that will be reflected in a relatively small production of meat and other animal products.

Faced by a serious food shortage during 1945-46, the Philippine Government has presented lists of requirements of food imports, a large part of which must come from the United States. The Philippine National Rice and Corn Corporation has estimated the minimum rice requirements at 385,000 tons, 132,000 tons of which will be supplied by the United States. For the rest, the Philippines are looking toward Siam, Indochina, and Latin American countries such as Ecuador and Chile. Fish allocations amount to 23,850,000 pounds. In addition to rice and fish, the Philippines will receive meat and dairy products in quantities shown in the table on allocations.

Table II.- PHILIPPINES: United States food allocations of selected items for the 4th quarter of 1945, 1st quarter of 1946, or the fiscal year 1945-46.

(Short tons)

Item	4th Quarter of 1945	1st Quarter of 1946	Fiscal year
Rice	28,750	60,000	
Corn	3,584	not yet available	
Meat and meat products	1,500	3,500	
Fish, canned	-	-	11,925
Dairy products (condensed and evaporated milk)	4,862	8,700	
Sugar	1,000	2,000	

Netherlands Indies

Summary

Confused political conditions make a complete evaluation of the food situation in the Netherlands Indies, especially in Java, very difficult.

Both British and Dutch authorities are expecting a food shortage in large parts of Java, due partly to an undetermined decline in production, but above all to a breakdown in transportation. A food shortage already exists in such cities as Batavia, Semarang, and Surabaya, at present controlled by Allied forces, while the rural areas are being held by Indonesian forces. Spokesmen of the Indonesian government have so far denied reports of a pending serious food shortage due to decline in production. Whatever difficulties do exist have been ascribed by them to transportation difficulties.

A recent estimate of the amount of rice, corn, cassava, and sweetpotatoes available for consumption in Java during 1945-46 shows a decline of about 13 percent, in terms of calories, compared with the 1936-39 average. This estimate, made by the Central Bureau of Statistics, does not bear out the flat denial of import needs made by some Indonesian officials, but indicates that Java will require moderate imports of foodstuffs, especially of rice or other cereals.

Prewar and Wartime Situation

Normally, the Netherlands Indies is one of the world's large exporters of such foods as sugar, cassava, copra, and palm oil. These products usually account for about 27 percent of the value of all agricultural export crops. Rubber, tea, coffee, cinchona, and tobacco make up most of the balance.

The main crops grown for domestic consumption are rice, corn, cassava, sweetpotatoes, peanuts, and soybeans. During the 1920's and 1930's the Netherlands Indies were not self-sufficient in rice and soybeans. As a result of governmental efforts to bring about a larger measure of self-sufficiency, domestic production of the major food crops increased and import requirements declined during the 1930's. By 1940, the Netherlands Indies had become independent of rice and soybean imports.

Self-sufficiency in rice and other foodstuffs consumed by the Indonesian population was not achieved in all parts of the Indies; sections of Java, Sumatra, Borneo, and Celebes depended upon shipments from surplus-producing regions. This distribution of foodstuffs called for the maintenance of an efficient inter-island communication system. The only serious food deficit for the Netherlands Indies as a whole was in dried and salted fish, of which over 100,000,000 pounds were imported annually.

The Japanese occupation made inter-island communication difficult and caused great deterioration of transport facilities in Java. Furthermore,

the occupation led to a decline in agricultural export industries. The Japanese concentrated their efforts on cultivation of cotton and castor beans needed by their war machine and on the expansion of food production to meet the greater requirements resulting from the natural increase of population and the demands made by their military forces. Preliminary reports seem to indicate that the Japanese agricultural programs did not reach the goals that had been set. Diversion of labor and land to cotton and castor-bean production is reported to have been responsible for a decline in the production of corn, cassava, soybeans, and other foodstuffs in Java. The only exception is rice, which yielded in Java 4,700,000 short tons in 1944, according to unofficial reports. Preliminary unofficial estimates place the Java 1945-46 rice crop at about 4,000,000 short tons of clean rice.

At this time, no prediction can be made about the rehabilitation of the agricultural export industries of Java or the restoration of food-crop production to prewar levels. The political strife between the Dutch and Indonesians will have to be settled before any serious thought can be given to the rehabilitation of the sugar and other agricultural export industries.

SOUTHERN BRITISH DOMINIONS

Food production in the southern British Dominions (New Zealand, Australia, Union of South Africa), during 1945-46, is estimated to be about 14 percent below prewar, and is below average for the third consecutive year. Output of livestock production is at a high level in New Zealand, but wheat production was reduced by unfavorable weather. Australia has only partially recovered from the serious drought of 1944-45, and production is still below average, while the Union of South Africa is experiencing a serious and prolonged drought, which is likely to reduce production sharply below domestic requirements.

Rationing has been continued throughout the area in order to preserve food where supplies are short, and to provide larger quantities for export. The exports of mutton and lamb, pork, cheese, and dried fruits will be above prewar, but less wheat, sugar, beef, and butter will be exported. Reserved stocks of wheat in Australia are low, and the crop is below average. Furthermore, above average imports will be needed by New Zealand. Sizeable imports of wheat and corn into the Union of South Africa will be a necessity, if suffering and starvation are to be prevented among the native population.

Australia

Summary

Australian food production in the 1945-46 crop year is considerably higher than in the preceding year when drought reduced food production to two-thirds of normal. Less wheat, sugar, beef, and butter will be produced in 1945-46 than was produced on the average in 5 prewar years. However, more dried fruit, mutton and lamb, pork products and cheese, will be produced. The demand of the Allied Armed Services in the Pacific for food supplies from Australia will be substantially smaller in 1946 than in 1945. With improved supplies and with smaller military demands for food, Australia will be able to export larger quantities of food in 1946 than in the previous year.

Prewar and wartime situation.—Australia is self-sufficient with regard to almost all foods. In addition, it is normally an important surplus producer of grains, sugar, meat, dairy products, and fruits. During the early years of the war, the shortage of shipping made the disposal of surplus foods difficult, but producers were reasonably well protected by bulk sales to the United Kingdom Ministry of Food. The outbreak of war in the Pacific changed the picture, however, and from 1942 there was an effective demand for all the food that Australia could produce. Vegetable production and the processing of foods expanded. Rationing was introduced in order to make more meats, dairy products, eggs, and sugar available for the United Nations. Production was handicapped by labor, fertilizer, and machinery shortages, and by a 2-year drought, which ended in mid-1945.

Outlook.—The 1945-46 wheat crop is estimated at 135 million bushels as compared with 53 million bushels in 1944-45. It is estimated that 55 million bushels will be available for export between December 1, 1945, and November 30, 1946, as wheat or as flour in terms of wheat. This compares with average prewar exports of 108 million bushels and exports of approximately 20 million bushels during the 1944-45 year. Barley production is estimated at 9.85 million bushels, of which very little will be available for export. Between 27,000 and 28,000 acres have been planted in rice, compared with average prewar plantings of 23,000 acres. Australia normally exports very little rice, but during the war most of the rice produced has been diverted from domestic markets to neighboring Pacific Islands that were cut off from their normal source of supply.

Milk production for all purposes in 1945-46 (July-June) is expected to exceed 975 million gallons. This would be about the same as production during the 1944-45 season but only 85 percent of average prewar production. Because of smaller military demand, it is planned to divert more milk from the production of preserved and dried milk to the production of butter and cheese. Butter and cheese production is forecast at 348 and 78.4 million pounds, respectively. With the continued rationing of butter for civilian consumption, it is expected to export 112 and 44.6 million pounds, respectively, of butter and cheese.

Australian production of meat for the 1946 calendar year is estimated as follows: mutton and lamb, 773 million pounds; beef and veal, 1,064 million pounds; and pig meats, 291 million pounds. This will be a 10-percent decline in beef and veal, a similar percentage increase in mutton and lamb, and a 50-percent increase in pig-meat production over prewar averages. Supplies of lamb are low, as the lambs are being held by grazers to replace losses caused by the 1944-45 drought. The increase is mainly in mutton. Although service demands have decreased, civilian rationing of meat is expected to operate at least until July 1946.

The production of raw sugar in 1945-46 (July-June) is estimated at 700,000 short tons. Coal shortage and inadequate manpower depressed production of refined sugar in 1945, so that service and rationed civilian requirements were not met in full. The civilian ration is now one-half a pound of refined or one pound of raw sugar per person per week. The labor situation is expected to improve in 1946-47, and it is hoped to increase sugar production to over 800,000 tons.

Indications are that fruit production in 1945-46 will be much greater than the extremely short crop of the previous year. There are prospects for a fairly heavy crop of apples and a medium crop of pears. However, shipping space may limit recovery of the war dormant export trade in fresh fruits. Production of raisins and currants is much above average and estimated at 164 and 60 million pounds, respectively. Approximately 157 million pounds of raisins and currants will be available for export. The apricot crop is only average, and it is reported that the peach crop has been damaged by fly infestation; consequently production of canned fruit will be low.

Egg production in 1945-46 is estimated at 115 million dozen with exports of 7.5 million dozen in shell and 9 million pounds in pulp. It is expected that production may rise to 130 million dozen in 1946-47, and the expected surplus above local requirements will be exported either in shell or as pulp to the United Kingdom. A shortage of packing material may limit exports in the last half of 1946.

AUSTRALIA: Production and trade in food products prewar, and estimated production 1945-46 by major commodity groups.

Commodity	Production		Domestic disappearance		Net exports	
	Prewar	Estimated 1945-46	Prewar	Estimated 1945-46	Prewar	1945-46
	1,000 short tons	1,000 short tons	1,000 short tons	1,000 short tons	1,000 short tons	1,000 short tons
Wheat	4,634	4,054	1,405	2,402	3,229	1,652
Barley	232	236	163	216	69	1/
Butter	218,599	274,000	110,964	118,000	107,635	56,000
Cheese	24,556	39,200	13,923	16,800	10,633	22,400
Beef & veal	594,958	2/532,000	474,106	2/386,400	120,852	2/145,600
Mutton & lamb	354,515	2/386,400	257,341	2/291,200	97,174	2/ 95,200
Pig meats	79,000	2/145,600	65,000	2/ 89,600	14,000	2/ 56,000
Sugar	373	350	184	288	189	62
Raisins	61,600	81,760	13,440		48,160	[illegible]
Currants	22,400	30,240	5,600	- (33,600	16,800	- (78,400

1/ Very little.
2/ 1946 calendar year.

New Zealand

Summary

The production of food in New Zealand during the 1945-46 crop year remains at the high levels established during 1944-45. The country continues to be one of the best fed nations of the world, although consumer rationing is still in effect on meat, butter, eggs, sugar, and tea. Meat and butter rations are maintained solely for the purpose of increasing supplies available for export. The butter ration is about one-half of prewar consumption, while meat consumption has been reduced by one-sixth. Because of increased demand, eggs have been in chronic short supply during the war. Sugar and tea are imported, and New Zealand's supplies are determined by the world situation in those commodities. Due to increased demand and to a short crop, there will be a demand for imports of 7 or 8 million bushels of wheat instead of the usual 2 or 3 million bushels. Other foods are domestically produced for local use and are in abundant supply.

Background.--Before the war New Zealand exported large quantities of meats and dairy products and imported all of the sugar, most of the tropical fruits, and from one-third to one-half of the wheat consumed in the Dominion. Total food production in New Zealand during the war has averaged about 10 percent higher than prewar levels. Most of this increase in quantity is accounted for by the basic livestock industries of the country. However, the largest percentage increase has been in vegetables, which during the war have been grown under Government contract to supply service requirements in the Pacific Area. The peak production year of the war was in 1941-42. Production declined in 1942-43 and again in 1943-44, but conditions improved and 1944-45 was another high production year. Production of food in 1945-46 is estimated to be at about the same level as that of the previous year.

1945-46 Consumption Review.--Total milk production will probably fall a little short of that of the previous year, which was the highest of the past 3 three years. Because of dry weather, the amount of butter graded for export during August, September, and October 1945, was 5 percent less than export gradings during the same months of 1944. However, it is estimated that the 1945-46 (August-July year) production of creamery butter should be near the 170,000 short tons produced in 1944-45. By maintaining the butter ration at 6 ounces per week, domestic use should be about 22,000 short tons, with the balance available for export. About 4,000 tons of cheese will be consumed domestically in 1945-46, leaving an exportable surplus of about 110,000 tons. No marked changes are contemplated in the production of dried whole, dried skim, condensed, and evaporated milk. The small exportable surpluses of these products are contracted to the United Kingdom.

The forecast of meat production during 1945-46 (October-September year) is a little below the 1944-45 figure but substantially above prewar averages. It is estimated that 588,000 short tons of meat (carcass weight) will be produced and that between 185,000 and 197,000 tons will be domestically consumed--more than 210 pounds per capita per annum. This would leave an exportable surplus of 391,000 to 403,000 tons. Restrictions on domestic sales of pork were lifted December 15, 1945. This may change the type of export, but it is not expected to affect the total quantity of exports. There is no indication that any other restriction on consumption will be eased.

Because of bad weather at seeding time and dissatisfaction with the established price, the smallest acreage since 1925-26 has been seeded in wheat. Yields are also expected to fall below average. The prospective small wheat crop will increase the country's usual deficit. With a crop of 5 million bushels it will be necessary to import 7 or 8 million bushels to fill present requirements.

During the war in the Pacific, the New Zealand Government secured a large increase in vegetable acreage to fill service requirements in that area. The United States Joint Purchasing Board ceased its activities in New Zealand on December 31, 1945. Consequently downward adjustments will

be necessary in vegetable and truck areas. If shipping is available, 500,000 cases of apples and pears will be sent to the United Kingdom in 1946. The domestic production of eggs is inadequate to meet the current domestic demand, and in most areas eggs are rationed in terms of numbers per butter registration, the number varying weekly according to the supply.

NEW ZEALAND: Production and trade in food products 1937-39, and estimated production 1945-46, by major commodity groups.

Commodity	Production		Apparent domestic disappearance		International trade	
	1936-37 1938-39 average	Estimated 1945-46	1936-37 1938-39 average	Estimated 1945-46	1937-1939 average Net exports	Prospective 1945-46 Net exports
	1,000 short tons	1,000 short tons	1,000 short tons	1,000 short tons	1,000 short tons	1,000 short tons
Lamb	163.5	193.8	8.4	7.8	155.1	186.0
Mutton	112.0	136.6	49.8	62.7	62.2	73.9
Beef	156.8	179.2	87.9	88.5	68.9	90.7
Veal	25.8	21.3	11.8	5.6	14.0	15.7
Pork, bacon and ham	52.6	39.2	21.3	25.8	31.3	13.4
Offal	15.6	17.9	5.0	6.7	10.6	11.2
Total meat	526.3	588.0	184.2	197.1	342.1	390.9
Butter	182.3	169.8	32.3	22.4	150.0	147.4
Cheese	99.0	116.0	7.0	4.0	92.0	112.0
Wheat	188.0	160.0	269.2	360.0	1/	

1/ Imports averaged 81.2 in 1937-39.

Union of South Africa

Summary

The current severe and prolonged drought has created a critical food situation which shows no signs of early improvement. This is especially true with regard to corn, which forms the chief staple in the diet of the large native population.

Prewar and Wartime Situation.—Production of food in the Union of South Africa may vary a great deal from year to year, since much of the country is semiarid. Before the war, South Africa usually exported small quantities of corn, meats, and dairy products and sizeable amounts of

sugar and fruits. However, it was necessary to import some wheat each year and, in drought years, corn was imported rather than exported. One of the nation's leading contributions to the Allied war effort was the provisioning of convoys during the long period when the Mediterranean was closed to Allied shipping. Substantial increases in the production of meats, dairy products, sugar, and potatoes were made in most war years. Fruit production increased only slightly, while cereal-grain production has declined for the past 2 years.

1945-46 Situation.--A prolonged drought, which reduced the corn crop of 1944-45, has continued through the 1945-46 planting season, and, as a result, food supplies are expected to be the shortest in many years. In an effort to cope with the situation, the Government of the Union of South Africa is enforcing strict economy in consumption and is attempting to secure greatly increased imports of cereals.

The corn crop harvested in May and June of 1945 totaled 1,830,000 short tons, compared with the average prewar production of 2,200,000 tons. With carry-over stocks and acquisitions from Union farmers and neighboring areas, the Maize Control Board possessed about 1,125,000 tons for distribution in 1945-46. Only about 830,000 tons were retained on farms, compared with the usual retention of 1,000,000 tons. In contrast to the reduced supply, estimated requirements totaled 1,700,000 tons, and as the Board was not able to purchase enough supplies to meet these requirements, rationing has been necessary. These requirements were higher than normal because of the reduced supplies retained by farmers and the extensive drought, which was especially severe in some of the native areas.

It was hoped that the 1945-46 corn crop would be early and thus relieve the acute food situation. But the drought, which affected only limited areas in 1945 has now become general. Spring planting was late, and it is estimated that the drought may reduce the 1945-46 crop to a little more than half of the average output. If the effect of the drought should be as severe as is now indicated, considerable quantities of imported foodstuffs will be needed in South Africa until at least the middle of 1947.

The drought also has seriously reduced the production of other food crops in South Africa in the current season. South Africa's annual requirement of wheat for bread is about 600,000 tons, the present crop of 300,000 tons is only about 60 percent of the average crop and 50,000 tons will be required for seed. Restrictions are in effect on the sale, distribution, and use of other cereals, as well as corn.

Wheat is normally consumed chiefly by the European element of the population; corn by the native. The present corn ration of 100 pounds per month per family of natives is generally considered quite inadequate. The bean crop is also poor and that of potatoes only fair. Little, if any, rice for import appears available. Regular domestic sugar supplies are obtainable with some remaining for export.

In addition to the grain shortage, the drought has brought on shortages of meats and dairy products that promise to continue for some time after normal rainfall comes. The position of fluid milk is better than that of butter and cheese. The egg supply has been well maintained, with some available for export. The current fish catch is unusually small.

GRAINS

World requirements of bread grains, feed grains and feedstuffs considerably exceed available supplies during the 1945-46 season. As a result, bread continues to be rationed in most countries with reduced rations in prospect for many during the balance of the season; livestock rehabilitation is not only being retarded, but in many cases further liquidation continues to take place, and year-end grain stocks promise to be reduced almost everywhere. Many factors have combined to bring about the most difficult world grain supply and requirement problems ever recorded. Among the factors affecting grains generally, the following may be noted:

a) The unusually severe drought in 1945 and greatly reduced yields in many parts of Europe, particularly in southern Europe and in North Africa.

b) The war campaign on the Continent of Europe and impacts resulting from it following D-Day took a heavy toll of the 1945 production. In addition, the breakdown of inland transportation increased distribution difficulties for domestic supplies.

c) Supplies in the Southern Hemisphere countries of Australia and Argentina were reduced by the 1944 drought. The 1945 Canadian grain crops were also adversely affected by unfavorable weather than considerably reduced yields.

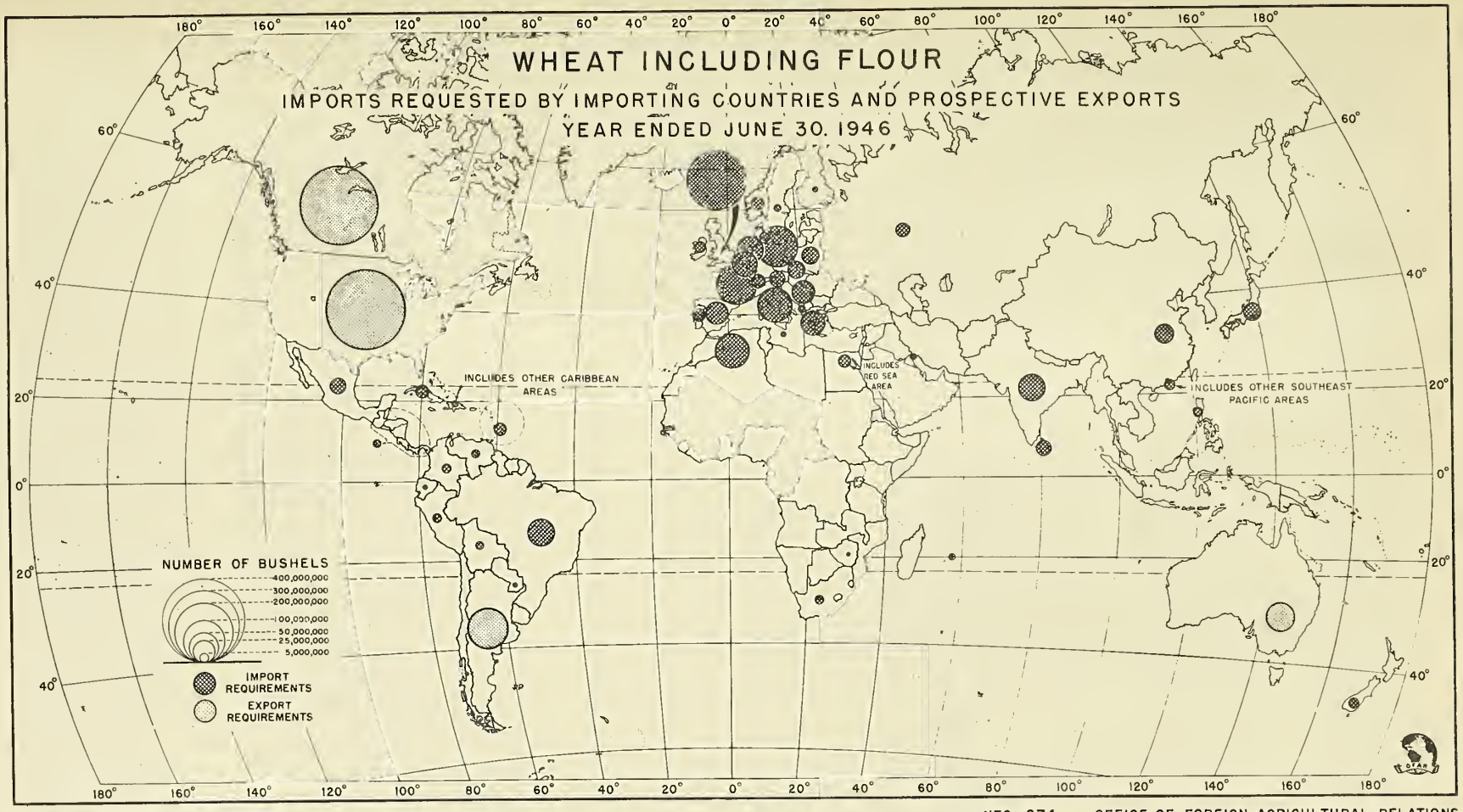
d) Disappearance during the war was unusually heavy because of increased feeding, particularly in North America. Most of the carry-over stocks in the United States, as well as the annual production, disappeared under the heavy feeding program of the past few years. The U. S. Government encouraged expansion in livestock production through price control legislation and subsidy payments in order to satisfy increased demands for domestic and military use and for lend lease. Livestock feed ratios have thus been very favorable for use of most grains during the war period.

e) Use for fuel and industrial alcohol also required considerable quantities of grain. The inability to import regular fuels into Argentina during the war period resulted in large quantities being burned, while in the United States sizable quantities were diverted to industrial purposes, due to the urgent wartime need for industrial alcohol for synthetic rubber and other uses.

For individual grains many other factors have been significant.

Wheat

For the first time since World War I the demand for wheat exceeds the supply available for movement in international trade. This unusual



U. S. DEPARTMENT OF AGRICULTURE NEG. 674 OFFICE OF FOREIGN AGRICULTURAL RELATIONS

The prospective supplies of wheat including flour for export from the United States, Australia, Canada, and Argentina, the principal exporting countries, amount to 850 - 900 million bushels for the year ending June 1946. The imports of wheat and flour requested by importing countries for this period amount to over 1,100 million bushels.

development has created a very difficult food problem in many importing countries. In contrast with other food shortages, the apparent wheat and flour deficit has arisen despite export supplies greatly in excess of prewar trade.

Supplies. The present estimated export surplus that might move from the four countries, Canada, the United States, Argentina, and Australia, during the July 1945-June 1946 period is placed at around 850-900 million bushels. As will be noted, this quantity is about double the average net exports from these countries during the 5 prewar years, 1935-39.

Wheat: Acreage, production and net exports in principal exporting countries, average 1935-39, and 1945-46 1/

Country	Acreage		Production		Net exports	
	Average 1935-39	1945	Average 1935-39	1945	Av. 1935-36 to 1939-40	Probable 1945-46
	Million acres	Million acres	Million bushels	Million bushels	Million bushels	Million bushels
Argentina	2/ 15.8	2/ 14.2	222	148	121	90-100
Australia	13.1	2/ 11.5	170	130	100	40-50
Canada	25.6	23.4	312	306	181	355-365
United States	57.3	64.7	759	1,123	39	365-385
Total	111.8	113.8	1,463	1,707	441	850-900

From official sources.

1/ Current figures based on data received up to February 1.
2/ Seeded acreage.

The record crop in the United States in 1945 accounts for a considerable part of the above-average export supply this season, while a reduction in carry-over stocks to minimum operating levels would raise the export availability to the high figure indicated. Net exports of this size would be a record movement from the four exporting countries, with the United States movement over five times the 1937-41 average. If the United States reaches its export goal, it will have achieved the second largest movement ever recorded during the history of the international grain trade and will be the ranking exporter of wheat and flour for the first time since 1924-25. As will be noted, the acreage and production of wheat is below average in the other three exporting countries this season.

Canada and the United States account for over 80 percent of the prospective wheat and flour exports from the four principal exporting countries for the 1945-46 season, as compared with about 50 percent during 1935-39. Supplies from the Southern Hemisphere continue below average as a result of smaller-than-average crops this season and the reduction or virtual elimination of carry-over stocks, following last year's severe

drought. In the case of Australia, increased domestic needs are also a limiting factor. The indicated exports from the Southern Hemisphere during the January-June 1946 period are also expected to represent a larger-than-usual proportion of the year's shipments due to the urgent world needs in the months ahead. A substantial part of Australia's exports is scheduled to be in the form of flour.

The virtual breakdown of internal transport in Argentina during the September-December 1945 period has adversely affected export movement from that country this season. The transport difficulties have developed from the cumulative effects of the lack of adequate supplies of coal and fuel oil for locomotives, factories, and utility plants during the war period. Wheat and flour exports dropped from around 10 million bushels each in July and August to 8 million in September, 6 million in October, and about 2 million bushels in November. In addition to lack of fuel, the lack of truck tires and repair parts for rail and truck equipment for movement of grain from farms to railways, mills, and even to ports in some districts, has further aggravated the situation. Markets normally dependent upon Argentina for supplies have been calling upon North America to meet current needs, which in turn directly affects the supply available for shipment to the war-ravaged areas of Europe and the Orient. While the transportation position is improving, the backlog of commitments and sales for export and domestic milling needs is delaying the resumption of regular export movement.

Requirements. Stated requirements of wheat and flour in 1945-46 are estimated to be over 1,100 million bushels or approximately double the world net import trade of about 550 million bushels in wheat and flour during the prewar period. Such requirements represent a record in the history of the international grain trade and result from a combination of circumstances that may never again be repeated. The factors that were noted above as affecting the world grain situation generally all apply to wheat. In addition, wheat requirements have been increased by reduced supplies of rice in the Orient, especially for parts of China and India, and for Japan, Ceylon, and the East Indies. The shortage of feed grains and disrupted transportation facilities, particularly in Europe, have greatly hampered collections from farmers, and have been reflected in larger stated import requirements. Reduced potato crops, particularly in France, central Europe, and Poland, have also raised cereal needs; similarly, small corn crops in parts of Latin America, the Balkans, and Italy, where corn is used extensively for food, are reflected in larger wheat needs.

Disruption of normal agricultural production in eastern Europe resulted from the sudden breaking up of large estates, transfer of populations, and requisitioning of livestock, draft power, and agricultural equipment. These factors, together with drought damage, reduced supplies of cereals, particularly wheat, to one of the lowest levels on record, placing urban areas in a very difficult food position. In addition, there were heavy requirements for the armies stationed in some areas. The cereal requirements of the urban areas of Poland, eastern Germany, parts of Czechoslovakia, Yugoslavia, and Hungary - all

exporters before the war - have in turn been submitted for many areas as a foreign wheat and flour requirement, though supplies of other indigenous grains and potatoes are available within the country.

As Wheat is the cheapest bulk food available; effective requirements for wheat have risen substantially under the expanding UNRRA program. In turn, the deficit position between wheat supplies and requirements has widened, and supplies available for other countries, such as the United Kingdom, France and North Africa, Belgium, the Netherlands, Norway, Switzerland, Portugal, Spain, Sweden, the occupied zones of Germany and Austria, Latin America, and parts of the Orient, and India have been correspondingly reduced. The UNRRA group of countries at present includes Poland, Czechoslovakia, the two Soviet Republics of White Russia and the Ukraine, Yugoslavia, Hungary, Albania, Greece, the Dodecanese Islands, Italy, China, and a program for Austria and Finland.

With stated world requirements for wheat and flour exceeding available supplies for the current 1945-46 season by over 200 million bushels or roughly 25 percent and for the January-June period of that season by 35-40 percent, it is obvious that they cannot be met in full. Inasmuch as requirements during July-December 1945 were much less than those indicated for the January-June period, the impact of the deficit position will be felt largely during the late winter, spring, and early summer months. The 1946 harvests will then start to become available in both importing and Northern Hemisphere exporting countries.

An examination of world requirements shows that most of the increased for this season comes from countries that were either exporters or about self sufficient prior to the war. It may be expected, therefore, that while import needs may continue large next year, the record import demands of this season are not likely to be repeated.

The distribution of wheat and flour under present conditions is no easy task. The current situation emphasizes that bread is indeed the "staff of life," when for many millions of persons this season it is about the only foodstuff that may be available to prevent starvation. No simple formula or single criteria can be used in evaluating requirements or determining distribution. Many factors or measures are involved and in varying degrees in the different countries. Among them may be noted: The level of bread rations; the ratio of self-suppliers to nonproducers; the availability of other foodstuffs, particularly other grains and potatoes; government and food organizations, both as regards collections and distribution; transport facilities; stocks; relative normal food standards, etc. Countries with large urban populations are largely dependent upon imports and in general have usually been regular importers. On the other hand, countries with large peasant populations have fewer persons dependent upon movement of food either from abroad or from farms within the country. Taking all these factors into account, the areas with the most difficult food and bread problem this season appear to be Italy, Germany, French North Africa, France, Spain, India, and China.

Other Grains

Of the other principal grains - rye, barley, oats, corn, and grain sorghums - all are currently in limited supply except oats. Even oats are not in very plentiful supply for export due to the relatively small part of the crop that is marketed in commercial channels. Sources of supply for other grains are even more limited than in the case of wheat, and are currently confined to one, two or possibly three countries, depending upon the grain; moreover any attempt to move other than limited quantities of other grains would adversely affect the movement of wheat exports in the major producing countries.

Rye. If ample supplies were available this season, rye could be extensively used in many countries as a substitute for wheat. Normally it is the chief bread grain for much of central, eastern and northern European areas for which a sizable wheat requirement has been submitted. Supplies, however, are at the lowest level on record. The 1945 rye harvests in Canada and the United States were so small as to permit very little export, and though the Argentine crop appears to be average or better, the quantity that seems likely to move by the end of June is scarcely enough to meet urgent rye demands, much less substitute for wheat. Rye prices are now above those of wheat, a very unusual situation. Rye is in the shortest supply position of any grain.

Barley. For the past several years, the United States has been on a net import basis for barley, particularly for malting types from Canada. The reduced 1945 harvest in Canada has resulted in almost no exports, and the short supply position in the United States precludes any significant export shipments from that country. Argentina harvested a very good barley crop in December, but the internal transportation situation is delaying movement to ports for export. In many countries, particularly in North Africa, barley is used as a substitute for wheat and can be applied against the wheat requirement to the extent available. Most importing countries are also requesting sizable quantities of barley for malting and feed purposes, but export supplies are too limited to permit the use of significant quantities for such purposes this season.

Oats. The three principal sources of surplus oats are Canada, the United States and Argentina. The 1945 Canadian oats harvest was sharply reduced and exports will be limited this season. The record United States crop has resulted in larger supplies moving into commercial channels, and some exports are being made. The feed situation in the United States, however, is so tight, due to the reduced corn crop and the active demand for feed, that record quantities of oats are being fed. The 1945 oat harvest in Argentina was reduced below that of a year earlier, but some carry-over stocks are on hand so that exports can be made as soon as grain is moved to port. Inasmuch as oats are in less active demand in international trade than other grains, it may be expected that as long as internal transport remains a limiting factor for export, wheat and other grains are likely to be more urgently requested. In view of the difficult wheat and breadgrain situation in prospect for the next several months,

however, the use of oats as a cereal food promises to be increased in many countries.

Corn. Though the bulk of the trade in corn in prewar years was for feed purposes, the supply available for export in 1945-46 will not be adequate to meet the more urgent uses for food. Import needs of corn for food have increased considerably as a result of reduced corn crops in Mexico, Cuba, Italy, the Balkan countries, and the Union of South Africa, where corn is a staple item of food, and in many other countries, where it is a source of other food products and starch. The short corn crop in Argentina in the spring of 1945, together with the extensive use of previous stocks for fuel, preclude any large exports from that country until the new harvest becomes available in May-June of this year. While still too early to make a reliable forecast of the new crop, unofficial reports indicate that the harvest will be below average though it should be above last year's low outturn. The threat of locust damage is reported the worst in many years. As a result of last year's short crop, the Union of South Africa, which is usually an exporter, is now importing corn. The new harvest prospects also are reported unfavorable because of extended drought. The United States corn supply is below that of any recent year due to the reduced harvest, both in quantity and quality, in 1945. January 1, 1946 stocks of corn were the smallest since 1941, and with the heavy feed and industrial demands, available supplies for export are expected to be very limited until the 1946-47 season at least.

Grain Sorghums. The United States, which is the principal source of commercial supplies of grain sorghums, harvested a greatly reduced crop in 1945. As a result of heavy feed and industrial needs, and the difficulty in procuring supplies for export, no significant quantities are expected to be available for shipment at least until the 1946 harvest.

It is thus apparent that despite a prewar feed grain movement of around 16.3 million short tons in international trade, the quantities of these grains available in 1945-46 will be but a fraction of this total. Most of the trade in these grains will be directed into food channels in order to alleviate the breadgrain shortage, so that in turn the quantities available for feed will be further reduced.

Rice

The 1945-46 world rice crop will be about 6,200 million bushels of rough rice against 6,700 million in the previous year, and the prewar average of 7,400 million bushels. The unprecedented decline in production as a result of the war means that rice supplies available from this year's harvest are about 10 percent less than those from the small production a year ago, and between 15 and 20 percent less than supplies obtained from the average prewar production from 1935-36 to 1939-40. Virtually all the reduction occurred in Asia, where 95 percent of the world's rice is produced, and harvests in Europe also were smaller than in 1944-45 and considerably below prewar levels. Production in North America increased slightly, and incomplete information about Africa indicates that the outturn there increased over last year. If normal weather conditions prevail, the South American total production may exceed that of last year.

In Asia, the output is estimated at 5,800 million bushels compared with 6,300 million last year and 7,100 million bushels during the prewar period. Expressed in milled rice, Asia's supplies, therefore, are about 40 billion pounds less than in 1936-1940. Disorganized farming conditions, the development of acute fertilizer shortages caused by curtailed imports, and reduction in farm animals and equipment, have been the chief factors causing the reduction in occupied countries. The 1945 crop in China was smaller than the outturn last year and about 18 percent below the 1935-39 average, or 475 million bushels (15 billion pounds) less that production during that period. A preliminary estimate of the Indian crop indicates a smaller harvest than a year ago, the result of unfavorable weather in South and Central India.

The greatest drop in rice production during the war occurred in Japanese-occupied countries and in the Japanese Empire. The 1945-46 outturn in the normal exporting countries, Burma, Siam, and French Indochina, is estimated to be from 50 to 65 percent of prewar, which leaves very little rice for export from the 1945-46 crop, compared with about 12 billion pounds exported from this region before the war. Comparatively small stocks from previous crops are available for export to needy Far Eastern countries in 1946. Rice supplies are seriously deficient in Asia's prewar importing countries. Production in the Netherlands Indies, formerly almost self-sufficient, is reported to be below prewar. The Philippine crop, about 60 percent of normal, is short of prewar consumption by 45 million bushels, or more than 1 billion pounds milled.

The Japanese rice crop this year may be more than 30 percent less than prewar average production, representing a decrease of 200 million bushels (7 billion pounds brown), as a result of prolonged cold weather, typhoons, floods, and fertilizer shortages. Storms and lack of fertilizer curtailed Formosa's 1945 production to about 55 percent of prewar, which means a reduction of 45 million bushels, or 1.6 billion pounds of brown rice. The harvest in Korea likewise was reduced by fertilizer shortages.

In the Western Hemisphere, a record crop was produced in North America as a result of a slightly larger crop in the United States. In South America, the Brazilian rice acreage (planted principally from September to November), is probably as large or larger than last year. The exportable surplus from Brazil from the 1945-46 crop may be from 250 to 300 million pounds, if normal weather permits the harvesting of average yields in the rice-exporting State of Rio Grande do Sul. The Ecuadoran trade forecasts an exportable surplus of 100 million pounds from the 1945-46 crop, according to plans for increased intentions to plant. British Guiana is promoting its rice industry by increased mechanization and other Government aid. Some countries, as Bolivia, Peru, and Venezuela, may desire to import a total of 25 to 50 million pounds of rice.

The 1945 European rice production was reduced to about 65 percent of the prewar average, as a result of shortages of fertilizer and labor in Italy, with a consequent decline in acreage and yield per acre, and reduced acreage in Spain and Portugal. Curtailed production and shortages of other grains have eliminated the exportable supplies usually available in Spain and Italy.

In Africa, the Egyptian crop exceeded that of last year as a result of favorable weather late in the season. The surplus will about equal that obtained from the 1944 crop, or 330 million pounds of milled rice. The 1945 production in Madagascar is larger than that of the preceding year. Although the Australian rice crop was restricted by low water supplies, the outturn is expected to be larger than last year's harvest, which was reduced 50 percent by drought.

Rice: World production and trade 1935-36 to 1939-40, estimated production and exports in 1945-46 a/

Continent and country	Estimated production 1935-36 to 1939-40	Estimated production 1945-46 b/	Apparent domestic disappearance: Prewar average c/	International trade: Prewar average c/ Net imports	International trade: Prewar average c/ Net exports	International trade: Prospective 1945-46 d/ Net exports
	1,000 short tons	1,000 short tons	1,000 short tons	1,000 short tons	1,000 short tons	1,000 short tons
Asia:						
French Indochina	e/4,978	-	3,494	-	1,484	f/
Siam	3,356	-	1,840	-	1,516	f/
Burma	5,489	2,700	2,237	-	3,252	f/
China(22 provinces	41,318	34,000	41,729	411	-	-
Manchuria	503	-	588	85	-	-
Japan	9,338	6,310	11,299	1,961	-	-
Korea	2,939	-	1,646	-	1,293	f/
Formosa	1,343	700	923	-	420	0
Philippine Is.	1,723	1,000	1,788	65	-	-
British Malaya	427	-	1,206	779	-	-
Netherlands In. g/	6,960	-	7,171	211	-	-
India h/ . . .	32,500	33,400	33,750	1,250	-	-
Ceylon	252	125	856	604	-	-
Others	985	-	1,488	580	77	-
Estimated total	112,110	92,000	110,014	5,946	8,042	f/
Europe:						
Italy	550	297	385	-	165	0
Spain	152	154	152	-	f/	0
European total	777	515	2,077	1,465	165	0
Africa:						
Egypt	464	612	332	-	132	185
African total	1,520	1,860	1,724	364	160	200
North America:						
United States	729	1,026	622	-	107	250
Mexico . . .	59	-	50	-	9	-
Total . .	937	1,320	1,154	347	130	250
South America:						
Brazil . . .	972	-	930	-	42	145
Chile . . .	19	-	31	12	-	55
Ecuador . .	50	-	37	-	13	50
Total . .	1,307	2,020	1,330	103	80	285
Estimated World total .	116,690	97,800	116,350	8,245	8,585	f/

a/ In terms of milled rice. Rough rice of Asia is converted to a milled basis at the rate of 70 percent and that of all other countries at 65 percent. b/ Preliminary. c/ 1936-40 average where available. Otherwise, the latest 5 years are included for which figures are available. d/ International trade in rice is subject to allocations, which are not available by country of import. e/ Less than 5-year average. f/ Unavailable. g/ Estimate for all Netherlands Indies. h/ Including an estimate of production in unreported areas.

Fats and Oils

The world situation in fats and oils is expected to remain critical throughout the 1945-46 season. Both edible and inedible fats will continue in short supply. Because of the extreme shortage of the edible fats and oils, a larger proportion of linseed and other normally inedible oils are being consumed for food purposes. The estimated total volume of international trade, exluding butter, for 1945-46 is 6.5 billion pounds compared with 5.5 billion pounds in 1944-45 and 9.0 billion pounds in prewar years. The increased volume for the current season over last year is mainly the result of a larger production of peanuts, flaxseed, and whale oil.

World import requirements for 1945-46, based on about 80 percent of prewar consumption, total to approximately 9.4 billion pounds. This is about 3 billion pounds above the estimated world export supplies, which are under allocation so that the most urgent needs of each country may be met. The war-torn European countries have the largest needs, because domestic production, particularly of animal fats and vegetable oilseeds in the Balkans, is considerably below prewar.

Total supplies will remain inadequate to fulfill requirements until production in the Far East is restored and shipments from that area again become available in volume, as this area prior to Japanese occupation contributed about 35 percent of the fats and oils that moved into international trade. Although the Far East, with its vast resources of these commodities, has been liberated for almost 6 months, exports have consisted solely of very limited quantities of copra from the Philippines. As yet Manchuria, China, Malaya, and the Netherlands have not contributed to alleviating the world shortage. Furthermore, for the first half of 1946 it is expected that shipments from theselast four areas will be very small.

Peanuts

Peanut supplies for consumption during the current year are about 5 percent larger than in 1945 and 10 percent above the prewar average. The largest increase in the 1945 crop occurred in the surplus producing areas of French West Africa. Although world peanut production is larger, the quantity available is not sufficient to meet world requirements, due to the general shortage of fats and oils, and to the great demand from countries wishing to reestablish their crushing industry. French West African peanuts will go to France and French possessions in North Africa. The United Kingdom and other deficit countries of the British Empire will obtain their supplies from India and British West Africa. Argentina's small surplus is expected to go largely to European countries and to Canada. The United States and other countries of North America, as well as China, the Netherlands Indies, and the Philippine Islands will require their domestic production to supply local demands.

Cottonseed

World production of cottonseed in 1945-46 is 5 percent below that of the

previous season and 28 percent less than the prewar (1935-39) average. The estimated supply of cottonseed oil for the year is 1.5 million short tons. Of this quantity only a small percentage is expected to enter world trade. Brazil, Argentina, and East Africa combined anticipate a surplus of 40,000 tons, which is expected to go largely to European countries and Canada.

Soybeans

World production of soybeans in 1945 may have been much smaller than the revised estimate of 564.5 million bushels for 1944. The 1945 production in Free China is slightly larger than that of the previous year. In the United States, last year's output showed an increase over 1944. The United States is furnishing a small quantity of soybeans and oil for European countries. Exports of soybeans, if any this season, will be small. Reports indicate a greatly reduced crop in Manchuria.

Sunflower seed

Supplies of sunflower seed for 1945-46, amounting to 4,000,000 short tons, about equal those of last year. Argentina, now the second-largest producer, has an estimated surplus of 100,000 tons of oil, which is being made available for export. Approximately 75 percent of this is expected to be shipped to the United Kingdom and other European countries. Canada and Latin American countries will receive a small percentage. Russia, the world's largest producer of sunflower seed, will need the entire oil output to meet domestic requirements.

Sesame seed

Production of sesame seed last year is estimated at 1.8 million short tons compared with 1.7 million in 1944. India and China are the important producing countries, and both consume the major portion of their production in the form of seed and oil. The total exportable surplus of oil is about 18,000 tons, originating in Africa and Turkey, and this will be shipped to Europe and the Middle East.

Olive oil

The 1945 olive oil production will be considerably lower than both that of last year and the average prewar output. Drought conditions and a certain amount of war damage in the Mediterranean Basin have been the main causes of the decrease. Tunisia may have an output of only 11,000 short tons compared with 82,500 tons last year. Spain's production probably will be about 60 percent of normal. The total output of Italy is expected to reach about 50 percent of prewar. Because of these poor prospects, only limited quantities of olive oil will move into export markets.

Copra and coconut oil

The 1945-46 outlook for copra and coconut oil is for gradually increasing supplies as a result of the liberation of the areas occupied by the Japanese. Total supplies entering international trade are expected to be about 30 to 35 percent of the prewar volume, but 5 to 10 percent above last year. Shipments from the Far East, however, will be smaller than anticipated earlier. Exports from the Philippines totaled only 9,000 tons of copra in 1945. However, future export prospects are bright for this area, and a monthly export of 25,000 tons may be reach by summer. Because of political disturbances in the Netherlands Indies, the world's largest producer, exports are expected to remain insignificant for some months to come. It is not believed that Malaya will resume shipments in any volume before the summer of 1946. In normal times these three areas exported about 75 percent of the copra and coconut oil, in terms of copra, entering world trade.

Palm and palm kernel oils

Palm and palm kernel oils at present are available in quantity only from Africa, which in normal times supplied about 54 percent of the net world trade of palm oil and 95 percent of the palm kernel oil. During the war, production in African countries was maintained at about the same level as prewar, despite the shortage of transportation and incentive goods. Minor quantities of palm kernel and babassu oils are being made available in the Americas, but no great increase in production is expected. Real relief from the world shortages of these oils will not come until the rich palm oil resources of the East Indies and Malaya become available. In the Netherlands Indies this probably will not take place in the near future, because of the unsettled political conditions, and shipments are expected to be very small in 1946.

Rapeseed

World production of rapeseed in 1945 was greatly reduced as compared with that of 1944 and earlier years of the European war. During German occupation the cultivation of this oilseed in European countries was expanded rapidly, but even at the highest level, production in this area was only a small part of the world total. India and China normally produce about 90 percent of the world total, and each exported a small quantity of seed in prewar years. Argentina has increased rapeseed production in recent years and has a surplus for export. India is the leading shipper of this oilseed at the present time.

Flaxseed

World production of flaxseed in 1945 was about 15 percent larger than that of a year earlier and 4 percent greater than the prewar average. Production in 1944, however, was at a very low level on account of drought in the

Southern Hemisphere, where the heaviest exportable surpluses originate. Linseed oil supplies in 1945-46 will not be sufficient to meet both edible and industrial requirements. A substantially larger volume of this oil is now being used for edible purposes on account of the shortage of edible fats.

Lard

The quantity of lard available for consumption during 1945-46 outside the Western Hemisphere will be considerably smaller than prewar. United States output during this period will be slightly larger than in the previous year but much reduced from the 1943-44 record. Canadian and Argentine production is forecast below that of last year. Because of the decreased hog numbers in Europe, the 1945-46 output of this commodity will be about 35 percent below prewar and probably slightly smaller than 1944-45.

Whale oil

The 1945-46 output of whale oil is expected to reach about 160,000 tons compared with about 40,000 tons in 1944-45 and 500,000 tons in the prewar years. To insure the greatest possible supply, the current Antartic whaling season has been extended four weeks longer than the customary thirteen weeks in the December-March season. Shortage of vessels, both catcher boats and floating factories, are limiting the 1945-46 output. Norway will be the largest producer, followed by Great Britain. Practically the entire production is being made available to European countries, where it is consumed largely for edible purposes.

SUGAR

World production of sugar in the 1945-46 season was about 28.0 million short tons, which was 0.4 million tons less than was produced in 1944-45, 2.7 million less than in 1943-44, and 6.2 million less than the prewar (1935-39) average output. Despite the small production this season and the tight supply-demand situation, the total that will be made available for consumption during the July-June period is likely to be 2 to 3 percent less than the total output, because of the time and location of production. Stocks at the end of the period, therefore, will be increased slightly over those of a year earlier.

World gross exports are indicated to total about 8.0 million short tons during the July-June period of 1945-46, or about 10 percent less than in the corresponding period of the previous year and about 35 percent below the prewar average. This estimate is based on the assumption that none of the reported stock pile of sugar in Java will be moved during the period. The low level of exportable supply, together with sharply reduced production in some importing countries, indicates that consumption in these countries will necessarily be reduced to the lowest levels for many years. It is probable, moreover, that the current period will record the smallest world consumption total for more than a decade.

From the longer-time point of view, the current season can be expected to be the low point in the downward swing of both world production and consumption. Given generally normal weather, prospects for 1946-47 are for substantial increases in sugar production in a number of important areas. Also, the demand is such that given increased supplies, consumption will rise accordingly. It is likely, however, that recovery of world production to prewar levels will be a moderately long process. In a number of important beet- and cane-sugar areas, mills will have to be repaired and rebuilt, and the agricultural portion of the industry needs to be reorganized and rehabilitated.

Production of sugar in Europe is estimated at 5.8 million short tons in 1945-46, or the smallest output for the area since 1923. It is about 1.1 million tons less than in 1944-45 and 43 percent below the prewar average. Production held up well in the United Kingdom, Eire, Sweden, Denmark, Switzerland, and Turkey. In France, sugar output increased, though the production of beets, of which much was not processed in 1944-45, was lower. Sugar production declined sharply in all other countries except the Soviet Union, which shows a continued substantial recovery from the low level reached in 1942. With such a sharp falling off in production, Europe as a whole requires substantial imports this season in order to maintain the relatively low wartime rations. In some countries consumption probably will be less than during the war years. During the first half of the period (July-December 1945) it is estimated that about 850,000 short tons (raw value) were imported (net) into Europe as a whole, of which about 500,000 tons were imported by continental countries, largely western Europe. Imports for the second

half (January - June) are not yet determined, but the low crop estimates indicate that some further imports will be needed. Average net imports during prewar years totaled 2,600,000 short tons with about 440,000 received by the continent.

For the United States, Canada, the Caribbean (including British Guiana) and Hawaii combined, sugar production in 1945-46 is expected to total 9.9 million short tons, or about 18 percent more than in the previous season and 16 percent more than the prewar average output. Prospects indicate substantially larger crops in the United States, Puerto Rico, Cuba, the Dominican Republic, and the French West Indies. In the area are both large net-importing and net-exporting countries, but the area as a whole is a large net exporter, the Caribbean being the chief source of supply of imported sugar for many countries of the world. The Caribbean (including British Guiana) and Hawaii are expected to supply about 6.3 million tons of sugar to the world during the period June 1945 to July 1946. Of this quantity a large portion is destined to the United States, Canada, and the United Kingdom. In the first half of the period, the United States imported about 2,000,000 tons, Canada 150,000 tons, and the United Kingdom 350,000 tons.

Because of the increasing demand for sugar in Mexico and Central America, occasioned by wartime improvement in purchasing power of consumers, the area as a whole has shifted in recent years from a small net exporter of sugar to a net importer of relatively sizable magnitude. In 1945-46 production is estimated to total 684,000 short tons (including the lower-grade brown sugars for local consumption) compared with a prewar output of approximately 506,000 tons. This season this area, largely Mexico, will require net imports of about 100,000 tons.

In South America, excluding British Guiana, production of sugar for the 1945-46 season is indicated to total 2,500,000 tons, or about the same as in the previous two seasons but about 300,000 tons more than the prewar average output. This area was a net exporter of sugar before the war, but because of increasing requirements during the war years it has about reached a balance between supply and demand at substantially higher than world prices. Exportation to the United States of 100,000 tons from Peru this season is a movement of sugar stock-piled from the 1942-43 crop. It is possible, however, that some net imports from outside the continent will be required to meet consumption requirements.

Production in Africa in 1945-46 is indicated to total 1.1 million tons or about 10 percent less than in the previous season and the prewar total. The decline in production - about 100,000 tons - is reflected in a decline in net export surplus of a like amount, but the distribution of sugar in the different consuming countries has shifted considerably during the war years. The principal producing countries are consuming at a sharply higher rate than in prewar, while the importing areas are consuming at a much lower than prewar rate. Total exports are expected to be only about 50 percent of prewar, or about 450,000 tons, of which a portion is stock-piled sugar in Reunion Island.

Production of sugar in Asia and the adjacent island areas in 1945-46 is expected to total only 7.3 million short tons (the production in India is in terms of gur) compared with 7.9 million tons in 1944-45 and 10.8 million tons, the prewar average. The output in India, China, Iran, and Indochina is indicated to be well maintained, but it has declined sharply from prewar levels in the other areas. Prospects indicate that in Java, Formosa, and the Philippine Islands, production will be only a fraction of the prewar period. These three areas were important export-sugar producers, with Java exporting in prewar years about 1.2 million tons to the Middle East, Europe, and Asia; Formosa exporting about 1.1 million tons to Japan and other Far Eastern areas; and the Philippines exporting about 0.9 million tons to the United States. Exports from these three areas this season are expected to be negligible. It is reported that a large stock pile, possibly 1.0 million tons, of sugar is available for export from Java, but because of the chaotic political situation now prevailing, it is expected that none of this sugar will be moved in the current July - June period. In fact the Asiatic area, as a whole, now has a requirement of close to 0.4 million tons net imports unless the Java sugar becomes available.

Australia and the Fiji Islands are expected to produce about 760,000 short tons of sugar this season or about 50,000 tons less than in the previous season and nearly 300,000 tons less than in the prewar period. The exportable surplus is expected to be only about 250,000 tons compared with 575,000 tons in prewar years.

SUGAR: Production, imports, exports, and estimated disappearance, prewar average 1/ and preliminary estimate 1945-46
(In thousands of tons)

Region and country	Production		Gross imports		Gross exports		Estimated disappearance	
	Prewar average	1945-46	Prewar average	1945-46	Prewar average	1945-46	Prewar average	1945-46
North America								
United States	1,994	1,835	4,867	2/2,007	109	2/208	6,700	n.a.
Canada	76	85	470	2/ 148	3	2/ 15	517	n.a.
Total	2,070	1,920	5,337	2/2,155	112	2/223	7,217	n.a.
Caribbean								
Cuba	3,168	4,750	0	0	2,843	3,470	174	40
Puerto Rico	974	1,100	0	0	845	1,000	67	10
Vi								
British West Indies (Incl.BritishGuiana)	679	583	0	0	567	500	53	83
Total	5,477	7,059	0	0	4,862	5,514	327	66
Mexico 3/ and CentralAmerica	506	684	8	111	10	7	507	78
South America								
Argentina	482	500	1	25	5	0	448	52
Brazil	1,155	1,320	0	0	49	50	1,076	1,27
Peru	449	460	0	0	328	415	95	14
Total	2,211	2,464	246	328	395	465	1,956	2,4
Europe								
Western and Southern	3,586	2,195	3,851	908	965	122	6,463	-
Central and Eastern	6,263	3,568	167	80	489	60	5,763	3,58
Total	9,849	5,763	4,018	988	1.454	182	12,226	-
Africa								
Egypt	167	200	0	0	73	47	161	153
Mauritius	321	145	0	0	311	120	10	25
Union ofSouth Africa	498	547	0	0	220	47	278	500
Total	1,260	1,117	525	122	823	445	1,039	
Asia								
India 4/	6,168	(6,000)	110	0	0	0	6,290	6,000
Japan (ex.Formosa)	234	(105)	1,183	0	195	0	1,224	105
Formosa	1,202	175	0	0	1,055	110	110	65
Java	1,447	(125)	2	0	1,213	0	234	350
Philippine Islands	1,127	(15)	0	10	888	0	239	25
Total	10,804	7,322	2,369	566	3,410	140	9,745	7,973
Southwest Pacific								
Australia	893	700	0	0	438	200	390	500
Hawaii	986	900	0	0	960	740	45	60
Total	2,022	1,660	125	110	1,537	995	565	675
GRAND TOTAL	34,199	27,989	12,628	5/4,380	12,603	7,971	33,582	27,37

1/ For Europe 1934-38, other areas 1935-39. 2/ Trade July 1-December 31, only; therefore estimate of disappearance for the year is not available. 3/ Mexico figures include close to 100,000 tons of "piloncillo," a low grade type of sugar. 4/All figures in terms of gur. 5/ Excludes estimated imports totaling about 3,600,000 tons during January 1 to June 30, 1946, for countries now under CFB allocations.

FOOD FROM LIVESTOCK AND FISH

In 1945-46, food supplies from animals compare favorably with prewar in nearly all parts of the world except Europe and the Soviet Union, where supplies are much lower. In northwest Europe, including Norway, animal protein supplies will be augmented by relatively large supplies of fish. The summary table below indicates for Europe the supplies of meat and dairy and poultry products in relation to prewar. The accompanying maps indicate the level of livestock numbers and egg production in 1945 in comparison to prewar.

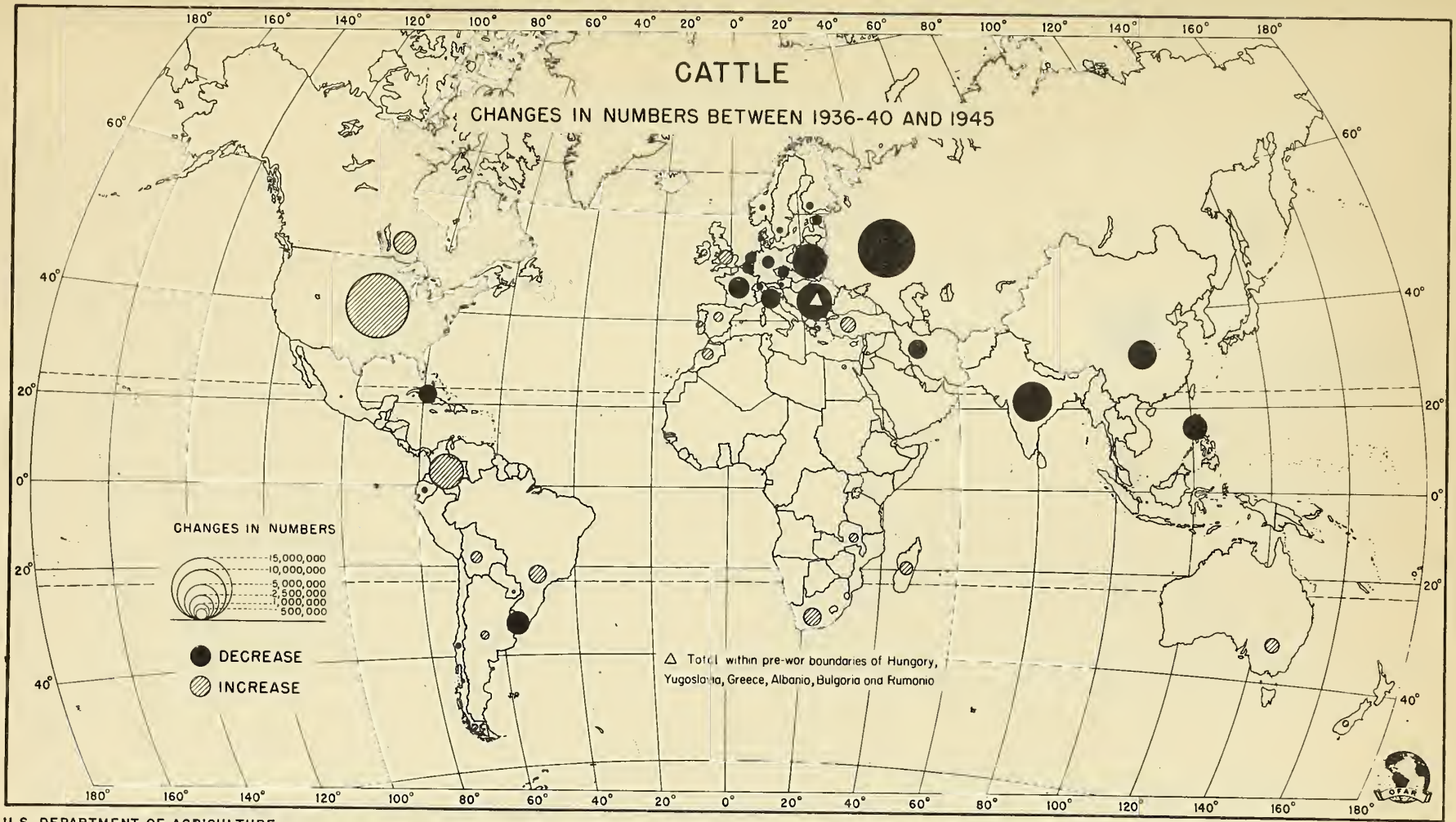
Continental Europe 1/: Estimated production of protein foods in 1945-46 compared to prewar production and consumption.

Item	Production		Average annual consumption 1934-38	Estimated 1945-46 production as percentage of average consumption
	Average 1934-38	Estimated 1945-46		
	Million pounds	Million pounds	Million pounds	Percent
Meat 2/	25,279	14,269	24,973	57
Cheese	2,746	1,385	2,636	53
Eggs 3/	4,872	2,441	4,657	52
Whole milk for fluid consumption		(45,000)	72,000	63

1/ Excluding Soviet Union. 2/ Carcass meat plus edible offal. Does not include poultry and rabbit meat. 3/ Converted on basis of 8 eggs to the pound, which is equivalent to 2 ounces or 56 grams per egg. Eggs in Europe vary from 45 grams to 62.5 grams each.

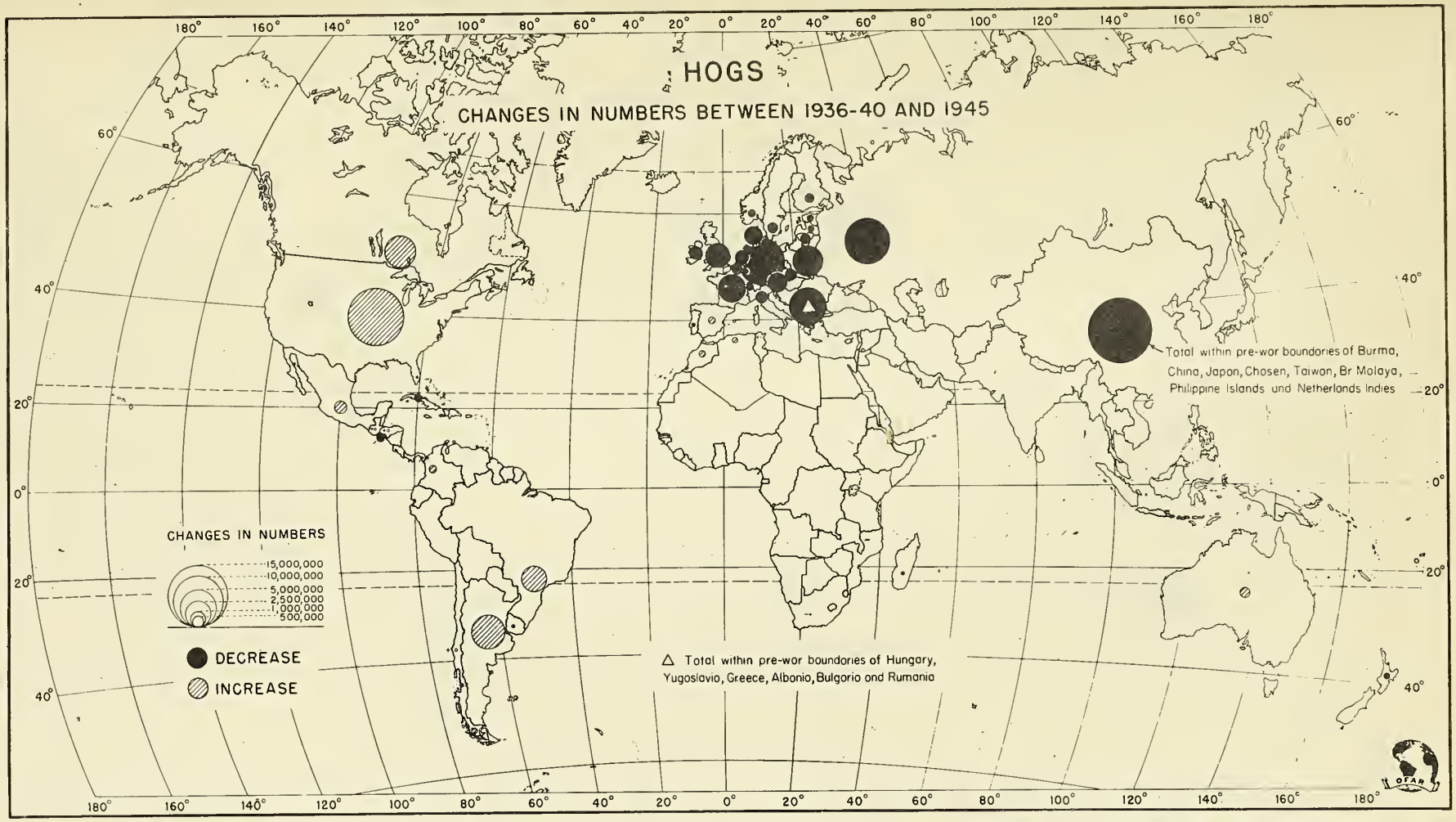
The world output of meat and dairy and poultry products was at high levels from 1938 through 1944 because of relatively plentiful supplies of grains and oil cake, good forage conditions, and the war demand for these products which stimulated production. Diminishing supplies of feeds, war losses of livestock, and unfavorable pasture conditions during the past year have brought some reduction in nearly all countries. Only in the United States and Canada has production been well maintained, and even here the pinch of short feed supplies has restricted production since 1944.

With increased quantities of grain directed into human consumption, any restoration of production of meat and dairy and poultry products in Europe will be retarded during the immediate future and outside Europe, production will tend to be restricted where dependent upon feed grains. High prices, however, will tend to encourage production of cattle and sheep in marginal areas in some countries.



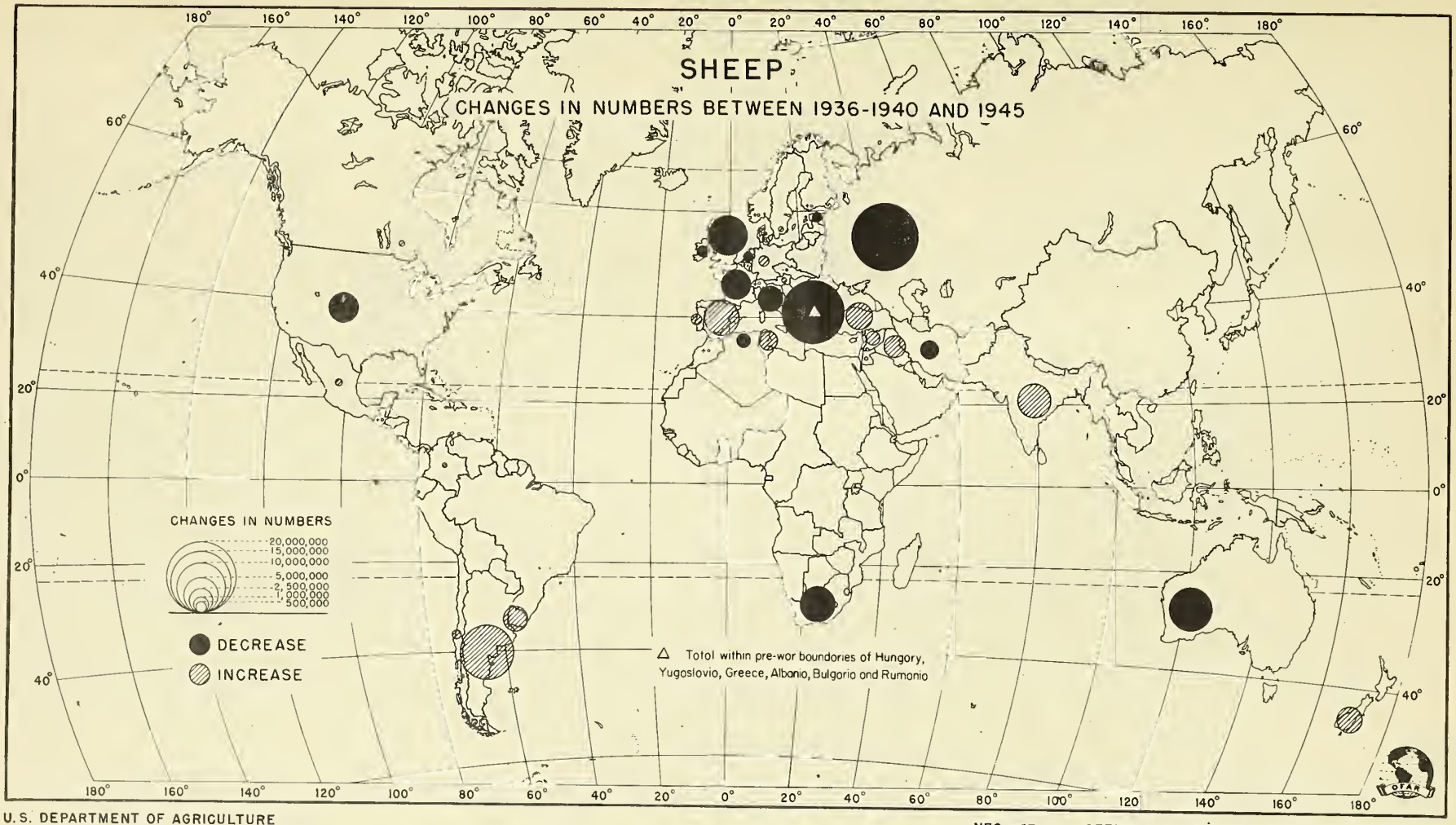
U.S. DEPARTMENT OF AGRICULTURE NEG.666 OFFICE OF FOREIGN AGRICULTURAL RELATIONS

World cattle numbers at the beginning of 1945 are estimated at 711 million head compared to an average of 723 million head for the years 1936-40. While cattle numbers in Europe showed an appreciable decline, 95.5 million head at the beginning of 1945 compared to 110.1 for 1936-40, the output of meat and milk dropped even more because of lower output per animal.



U.S. DEPARTMENT OF AGRICULTURE NEG. 66B OFFICE OF FOREIGN AGRICULTURAL RELATIONS

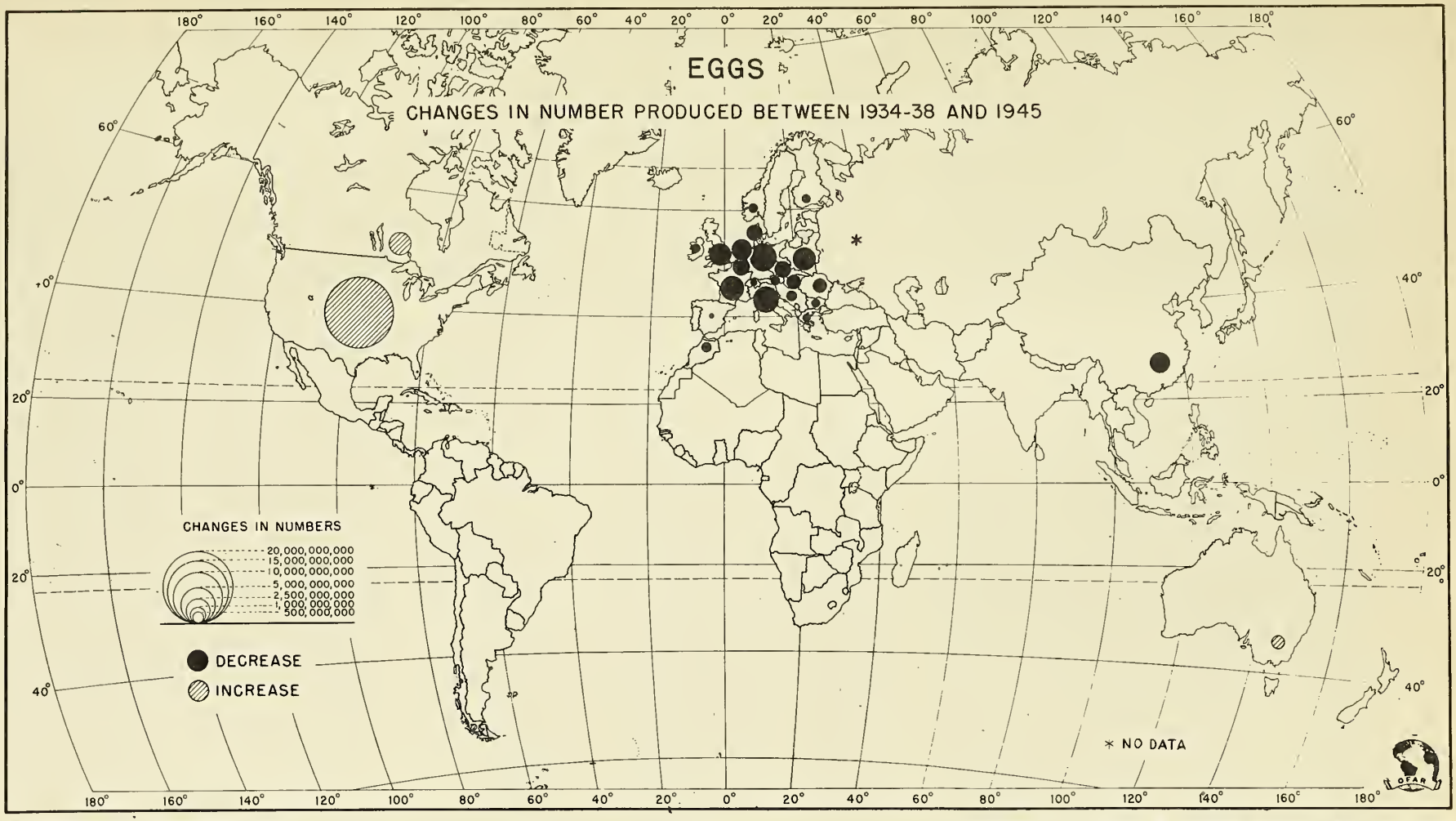
There were about 254 million head of hogs in the world at the beginning of 1945 compared with a 1936-40 average of 284 million. Further sharp declines have been experienced in central and southeastern Europe since the beginning of 1945.



U.S. DEPARTMENT OF AGRICULTURE

NEG. 667 OFFICE OF FOREIGN AGRICULTURAL RELATIONS

World sheep numbers totalled 718 million head at the beginning of 1945, compared with a 1936-40 average of 754 million. Numbers reached record levels in 1942, but sharp declines since 1942 in the United States, Australia, and Europe reduced numbers below pre-war levels.



U.S. DEPARTMENT OF AGRICULTURE NEG. 669 OFFICE OF FOREIGN AGRICULTURAL RELATIONS

World egg production in 1945 was about 5 percent less than the average for the years 1934-38. Egg production in Europe is only about half of pre-war levels but output in the United States and Canada is about 54 percent higher.

Meat

The year 1945 ended with actual deliveries of meat considerably below allocations, especially those to the United Kingdom and importing countries of Western Europe.

Production of meat in 1945 in the major supplying countries dropped sharply from the very high levels of the previous year, whereas military demands continued heavy during much of the year. At the same time, production in Europe continued to decline and dropped to levels that are only about 56 percent of prewar. Reduced shipments from Argentina, Canada, and the United States made it necessary to lower meat rations in the United Kingdom and substantially limited supplies reached France, Belgium, the Netherlands, and other liberated areas. As a result of this and the greatly reduced internal production, meat supplies in these countries at the beginning of the 1945-46 consumption years reached a very low level. In the United States and Canada, supplies of meat reaching consumers also dropped to their lowest level in 1945. Supplies in these two countries improved, however, toward the end of the year.

World production of meat in 1946 will show little if any improvement over last year, the reduction in output in central and southeastern Europe about offsetting the slight improvement expected in western Europe and any probable increase in the United States and Australia.

Larger exportable supplies of meat in 1946 than last year will be available only from the United States, and this primarily because of reduced military requirements. All available supplies will be required to meet the demands of the buying nations and of UNRRA primarily for the urban populations in deficit countries. Smaller quantities than last year will be available from South America and possibly Canada.

Slightly larger pork supplies will be available in Western Europe and in the United States. Pork production in Argentina, however, will show a decline, probably about 40 percent. In Canada pork and bacon production continues downward but beef and veal output is expected to increase. Otherwise, the proportions of the various classes of meat will show no significant changes in 1946 over that in 1945.

In comparison to prewar, meat production in 1945-46 in North America, Europe, and the principal producing countries of the Southern Hemisphere will average about 6 percent lower. Prospective supplies for export, however, will be higher than prewar with current estimates at 6,200 million pounds against a prewar total of 4,200 million pounds. This increase is largely accounted for in the greater exports from the United States and Canada. These exports are going mostly to replace the reduction in meat output in the United Kingdom and in the countries of Continental Europe.

In the United Kingdom, domestic production is 800 million pounds below prewar levels, and supplies from Europe, averaging about 650 million pounds yearly, were not available during the war. This made it necessary to increase the importation from North America and the Southern Hemisphere. The per capita consumption of meat in the United Kingdom remains at only about 80 percent of prewar, notwithstanding that about three-fourths of all exports go to that country.

Production of meat in Europe, excluding the Soviet Union, in 1945-46 is estimated to be only about 56 percent of prewar. The largest relative declines have occurred in the Netherlands, Belgium, Switzerland, Yugoslavia, Poland, Austria, Hungary, and Germany. The decline in the first three countries resulted largely from loss of imports of feed grains, but that in the others is directly related to war damage. Lack of feed imports caused a pronounced decline in pork production in Denmark, where output now is only about half of prewar.

In the Soviet Union, meat supplies are believed to be considerably below prewar levels. Livestock numbers, however, increased about 6 to 7 percent during 1945, with the largest increase in hogs and cattle. Part of this increase was due to the acquisition of livestock (mostly cows) from former Axis countries. The improvement in the livestock situation was reflected in an increased meat supply. This is evidenced by the improved fulfillment of the official meat rations. Since the fall of 1945, meat has been supplied in place of a certain portion of the fats ration when a shortage has developed in stores.

In contrast to the situation in Europe and the United Kingdom, meat production during the war expanded considerably in the United States, Canada, and Argentina, largely because of heavy stocks of grains on hand at the beginning of the war and unusually favorable seasons for feed production during the war.

Current meat production in the United States is at a slightly higher level than a year earlier and is estimated at 24,600 million pounds for 1945-46. This is about 42 percent above prewar production. Including edible offal, current allocations for civilian consumption are at an annual per capita rate of 162 pounds (150 excluding offal), compared to about 143 in 1945 and 134 in the prewar period. Allocations for exports and shipments for 1945-46 total nearly 1,600 million pounds, excluding substantial quantities from military stocks. The United States is furnishing almost half the meat from world supplies available to France, Belgium, and the Netherlands and more than 80 percent of the meat going to UNRRA.

Canada, New Zealand, and Australia continue to limit the quantity of meat going to their civilian populations in order to export larger quantities to the United Kingdom and liberated areas.

In Argentina, cattle marketings were reduced because of drought, and beef production in 1945 fell below earlier expectations. Some improvement occurred during the latter months of 1945 and early 1946. Pork production in 1946, however, is estimated at only 40 percent of 1945 and less than half the peak production in 1944.

In the outlook for meat production in 1946 and 1947, it is significant that there is a critical world shortage in feed grains. This fact will have a limiting effect on restoration of meat production, especially pork in Europe, and will tend to restrict production in the United States, Canada, and Argentina. Barring a serious decline in

consumer demand in the United States which is not anticipated, it is likely that all exportable supplies here, as elsewhere, will find a ready outlet abroad in 1946 and 1947.

MEAT 1/: Production and trade 1934-38, and estimated production and exports, 1945-46

Country	Estimated production		Apparent domestic disappearance	International trade		
	Prewar 2/	1945-46	Prewar 2/	Net imports	Net exports	Prospective 1945-46
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
United States	17,300	24,600	3/17,400	65	-	1,600
Canada	1,489	2,400	3/ 1,308	-	168	780
Mexico 4/	698	695	699	1	-	-
Cuba 4/	308	296	312	4	-	-
Argentina 4/5/	4,459	4,600	2,999	-	1,460	1,700
Brazil 4/6/	2,331	2,000	2,118	-	213	110
Uruguay 4/6/	571	475	247	-	324	220
Chile 4/	349	384	331	-	18	22
Paraguay 4/7/	87	150	71	-	16	65
United Kingdom	2,815	2,000	3/6,261	3,514	-	-
Eire	n.a.	n.a.	n.a.	-	76	18
Norway	225	126	227	2	-	-
Sweden 4/	660	554	644	-	16	-
Finland	265	176	260	-	5	-
Denmark	1,008	721	459	-	549	270
Netherlands	882	313	796	-	86	-
Belgium	750	335	796	-46	-	-
France	4,084	2,868	4,131	47	-	-
Spain	1,380	1,160	1,382	2	-	-
Portugal	317	365	317	-	8/	-
Switzerland 4/	419	270	436	17	-	-
Italy	1,535	1,088	1,650	115	-	-
Germany	7,628	3,650	7,884	182	-	-
Austria	653	9/	665	12	-	-
Czechoslovakia	957	664	957	-	8/	-
Poland	1,631	9/	1,531	-	100	-
Yugoslavia	654	341	632	-	22	-
Greece	278	179	279	1	-	-
Bulgaria	363	290	357	-	6	-
Hungary	836	190	822	-	14	-
Albania	31	20	31	-	-	-
Rumania	723	414	717	-	6	-
Total continental Europe	25,279	14,269	24,973	424	804	-
Union of S. Africa	672	800	678	6	-	-
Australia	2,310	2,160	1,736	-	534	640
New Zealand	1,160	1,176	551	-	610	782

(see footnotes on following page)

(footnotes for preceding table)
1/ Carcass meat plus edible offal. Includes beef and veal, pork, mutton and lamb, goat, and horse meat. 2/ Prewar average is for years 1935-39 for United States and Canada, 1935-38, principally for European countries, and 1934-38 for others. 3/ Adjustment made for storage stocks. 4/ Exclusive of edible offal. 5/ Excludes production of pork for consumption on farms. 6/ Excludes farm production and consumption. 7/Beef and veal only. 8/ Less than 500,000 pounds. 9/ Allowance included in total. N.a. = not available.

Fish 1/

The world fish catch, which was sharply curtailed by the war, has increased substantially since the cessation of hostilities. Those European countries normally depending upon fish for an important part of their food supply are increasing the fish catch as rapidly as possible, and 1946 supplies of fresh fish are expected to be considerably higher than in 1945. Japan may be permitted to increase her fishing industry somewhat in 1946 from the unusually low level of 1945. The supplies of salt fish will be increased rapidly in 1946 as Norway gets back into production and as Iceland converts back to that type of processing, and a moderate increase is expected in the supply of canned fish. Whaling activity is being resumed, and supplies of whale oil should increase considerably in 1946..

Estimates of the world shortage of fish, made in 1944, indicate a deficiency in production from earlier levels of 6 million tons. Of this shortage, 2 million tons were in the United Nations and Allied countries, 1/4 million in the neutral countries, and 3-3/4 millions in the Axis and Axis-controlled countries. The size of this deficit can be understood when it is compared with the total annual production of the United States, which averages around 2-1/2 million tons.

The production of fish began to decline at the start of the war, first in Europe, and later in other parts of the world as the war spread. Not only were fishing vessels taken for war purposes, but fishing operations were restricted by naval activities and the existence of mine fields, many of which were located on the best fishing grounds. Fishing, like all other industries, also was affected adversely by labor shortage. Further, for security reasons, it became essential to limit the areas of fishing activities, and the hours during which fishing could be carried on.

The absence of fishing activities for several years in the grounds off the European coasts has resulted in a large increase in the fish population. This means that more fish can be caught with less effort and with less equipment. This is most fortunate, as there is, and will be for some time to come, far fewer nets and other fishing supplies and

1/ Prepared in Fish and Fish Products Division, Special Commodities Branch, P.M.A.

equipment than are necessary for the maximum production of fish. The vessels which were taken for war work, and those which were destroyed are being replaced, but the number is still much below prewar.

Estimates of the production of fresh fish are lacking for many countries and regions. It can safely be assumed, however, that the catches will continue to increase with the rehabilitation of the industry. This is proceeding in keeping with the increase in manpower, vessels, and the supplies of gear. During part of the war period, countries like Iceland, rapidly increased the production of frozen and iced fish at the expense of the normal production of salted fish. Much of the fresh types of fish went to the United Kingdom, but it is expected that this trade will decrease with the return of the fishing directly off the coasts of that country. In normal times, exports of fresh fish are of little importance in international trade, as only a very small portion of the total catch moves abroad in that form. However, fresh fish does contribute largely to the food supplies for local consumption, and for that reason, particularly at present, strong efforts are being made to rebuild the home fisheries in most foreign countries.

The latest estimate for the world exportable surplus of salt fish for the current calendar year is 275 million pounds, an amount about 74 percent larger than for the preceding year. The increase is mainly due to the return of Norway as a source, and the conversion of the fresh and frozen fish activities in Iceland to the old-established salt-fish business. The estimated requirements of the several countries amount to 375 million pounds, or about 36 percent more than the supplies. Tentative allocations are being considered by the Combined Food Board, which would give to most countries more salt fish than they had in 1945, but much less than is wanted.

Trawlers from some of the European countries, notably Spain, Portugal, and France, are expected to operate extensively this year. These catches will undoubtedly be used in the respective countries. On the basis of the total expected production, exclusive of these countries, it appears that about 63 percent of the average prewar supplies will be obtained during this year.

Since the end of the European war activities, the countries on the North Sea have all returned to the catching and curing of herring and mackerel and other fish. Production has increased to a considerable extent, and at least some of these countries are now on an export basis. If the usual runs occur this year, there will be still larger amounts available for the use of countries in the interior of Europe.

The outlook for canned fish shows some improvement over that of 1945. Anticipated supplies will be slightly larger (7 percent) than the 1945 production. With the stocks on hand, the total supply will be about 1.1 billion pounds.

Against these supplies, allocations are being considered by the Combined Food Board. These have taken into account the changing needs of

the armed forces of the Allied Governments, and the increased needs of the liberated areas in Europe and elsewhere. In general, more canned fish will be available to most consumers, and it will help to replace the still deficient supplies of meat. If some foreign countries can obtain larger amounts of tin plate, their production of canned fish may be considerably greater than the currently estimated production in those areas. Should this occur, the supply situation will be somewhat further improved.

The fish production of Japan and the Soviet Union is an unknown quantity. Prior to the war, these countries were among the largest producers of fish. The latter has unquestionably increased its production, as the importance of fish in the national economy has long been recognized. For obtaining gear, nets, and twine, the Soviet Union has had a preferred position, and large amounts of such materials have been sent to them. The situation in Japan is not at all clear. On account of the manner in which the Japanese carried out their fisheries on the high seas before the war, and their unwillingness to cooperate with other nations in conservation activities, such as the International Whaling Agreement, it is probable that restrictions will be placed on their fisheries, although these will permit them to get the fish so essential for the feeding of their own people.

Milk and Dairy Products

The world supply of milk and dairy products at the beginning of 1946 continued short of demand, despite favorable milk flow in 1945 in most of the principal producing countries. Supplies continue to be allocated on an international level by the Combined Food Board. The high 1945 output of dairy products in the United States, Canada, and New Zealand, together with large military stocks, has made it possible to meet the most essential demands in 1945 and early 1946.

Under average conditions, total world production in 1946 is not expected to show much, if any, improvement over the 1945 output, which was increased by unusually favorable producing conditions in the United States, Canada, and New Zealand. Any improvement in output in spots in Europe will likely be counterbalanced by less favorable conditions than last year in the United States, Canada, and New Zealand.

Reduced reserves, some decline in output in supplying countries, plus diversions to fluid cream and high-return products in 1946, may tend to keep most dairy products in tight supply for another year. Only for dried skim milk are supplies expected to equal demand, and then not before midyear.

In comparison with prewar levels, milk production is high in the United States, Canada, and the United Kingdom. Notwithstanding the sizable increase in output of this group, about 23 billion pounds above prewar, there has been a net decline for the world.

Milk production in Europe, which in the immediate prewar period amounted to about one-half of the estimated world production, had fallen 25 percent by 1944. The decline to that time had occurred largely in Western Europe where production had been lowered by a substantial drop in cow numbers and also in output per cow. Since 1944 there have been heavy losses in the number of cows in Central and Eastern Europe and also some decline in output per cow. As a result, milk production in 1946 for ccontinental Europe (ex-Soviet Union) will be only 65 percent of immediate prewar output. The decline amounts to about 75 billion pounds, which is roughly equivalent to five-eights of the present production in the United States.

As a result of total lower production and of transportation difficulties, direct consumption of milk has declined to about 27 million pounds, which represents a drop of about 37 percent from prewar levels. There will remain about 20 billion pounds less milk available in 1946 for the manufacture of dairy products for consumption within Europe than prewar, after accounting for prewar exports of dairy products equivalent to about 11 billion pounds of milk and allowing for some reduction in the amount used for animal feeding.

Compared to the sharp changes from prewar in milk production in North America and Europe, changes elsewhere in the world are minor, except in the Soviet Union. No official estimates of current milk production in the Soviet Union are available, but based on estimated declines in cattle numbers during the war, the 1946 production of milk will be appreciably below the 63.6 billion pounds in 1938 as estimated by Soviet officials. The 1946 milk production, however, will be higher than in 1945, due to importations of cows from Central and Eastern Europe.

To the extent that milk production is related to cattle numbers, a picture of the wartime changes in production in the above areas and the rest of the world can be obtained from the map showing the declines in cattle numbers.

Butter

Supplies of butter entering world trade in 1945-46, estimated at about 625 million pounds, will be only about half the average annual exports for the years 1934-38. As in the prewar period, the United Kingdom will absorb most of these supplies, but the quantity will be less than 60 percent of net prewar imports, averaging 1,065 million pounds. At the same time, total supplies from domestic production in the United Kingdom have declined from about 105 million pounds to 18 million pounds.

Danish exports of butter are expected to total about 180 million pounds in the 1945-46 year, but part of this supply will remain on the Continent. In contrast, continental Europe, exclusive of the Soviet Union, had net exports averaging about 460 million pounds during the

prewar period 1934-38. Domestic supplies in 1945-46 will be materially less than prewar in France, Italy, and Poland, but in Central Europe, supplies of factory or creamery butter will about equal prewar levels. In this area the general shortage of fats during the war caused emphasis to be placed on delivery of milk to separating stations in order to obtain cream for butter. In the Soviet Union, butter production is believed to be materially below prewar by reason of large losses in cattle numbers.

Not much change is expected in creamery butter production in the United States in 1946 over the low output of about 1,350 million pounds in 1945 and the supply will be far short of demand. The per capita supply will be only about 2/3 of prewar levels.

BUTTER 1/: Production and trade 1934-38 and estimated production and exports, 1945-46.

Country and region	Production		Domestic disappearance	International trade		
				1934-38		Prospective 1945-46
	Average 1934-38	Estimated 1945-46 2/	1934-38	Net imports	Net exports	Net exports
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
United States	1,673	1,350	1,681	8	-	6/
Canada	248	310	246	-	2	5
Argentina	66	-	48	-	18	31
United Kingdom	44	18	1,109	1,065	-	-
Eire	89	-	37	-	52	-
Belgium	46	99	56	10	-	-
Denmark	401	302	73	-	328	180
Finland	61	-	32	-	29	0
France	187	143	182	-	5	0
Germany	792	1,000	963	171	-	0
Netherlands	201	143	92	-	109	0
Sweden	151	165	101	-	50	0
Switzerland	3/ 62	44	64	2	-	0
Czechoslovakia	27	28	28	1	-	0
Union of S.Africa	28	30	25	-	3	0
Australia	4/437	4/348	219	-	218	112
New Zealand	5/315	5/340	6	-	309	295

1/ Creamery butter. 2/ Estimated. 3/ Total butter. 4/ Production year beginning in July. 5/ Production year beginning in August. 6/ Will be limited to shipments of about 10 million pounds to United States territories.

Cheese

World supplies of cheese will continue short of demand through the first quarter of 1946 in spite of the high 1945 production in the five 1/ principal supplying countries, totaling 11 percent above 1944 and 69 percent above the 1934-38 average. With b ut a moderate decline expected in 1945 in these countries, chiefly in the United States, export supplies will continue high in 1946.

Requirements for cheese have been at a high level because of the general world shortage of high protein foods. About 3/4 of the export supplies of cheese go to the United Kingdom, where per capita consumption of meat is only about 79 percent of prewar. Cheese supplies available there for civilian consumption in 1945-46 will continue about the same as in 1944, when per capita consumption was 9.4 pounds for the year. This compares to 11.8 pounds in 1943 and a 1934-38 average of 8.8 pounds. In the United States the demand for cheese continued broad in the last half of 1945, and natural cheddar was still unavailable to a large portion of consumers. This situation will continue well into 1946, as the upturn in supplies will come later than usual because of the heavy demands for market milk and cream. In addition, sizeable quantities of cheese have been required for liberated areas in Europe.

Production of cheese in continental Europe in 1945-46, estimated at 1,385 million pounds, will be only 1/2 of prewar output. These current supplies for consumption will be about 1,230 million pounds, or 47 percent, less than prewar supplies, when allowance is made for prewar net exports from the Continent averaging 130 million pounds for the years 1934-38. In addition, as shown in the summary table above, continental supplies of animal protein foods from domestic sources in 1945-46, compared to prewar will be 43 percent less in the case of meat (excluding poultry and rabbits), 48 percent less in the case of eggs, and 37 percent less in the case of milk for fluid consumption.

As indicated in the table following, the countries in which the 1945-46 supplies of cheese will be appreciably below prewar, are France, the Netherlands, Italy, Germany, Poland, and Belgium.

If the United Kingdom continues to require cheese imports at the present annual rate of 450 million pounds in lieu of higher supplies of meat, it would appear that little more than 200 million pounds of cheese will be available out of world supplies for export to other areas.

1/ United States, Canada, New Zealand, Australia, and Argentina.

CHEESE 1/: Production and trade 1934-38, and estimated production and exports, 1945-46.

Country and region	Production: Average 1934-38	Production: Estimated 1945-46	Apparent domestic disappearance 1934-38	International trade 1934-38: Net imports	International trade 1934-38: Net exports	International trade Prospective 1945-46: Net exports
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
United States	643	1,000	696	53	-	250
Canada	115	180	43	-	72	130
Argentina	68	-	65	-	3	26
United Kingdom	2/ 81	54	394	313	-	-
Eire	4	-	3	-	1	-
Finland	20	7	8	-	12	-
Norway	39	17	36	-	3	-
Sweden	76	68	78	2	-	-
Denmark	69	79	51	-	18	2
Netherlands	3/ 266	53	135	-	131	-
Belgium	4/	3	50	50	-	-
France	324	154	330	6	-	-
Spain	31	5/	33	2	-	-
Switzerland	3/ 112	88	74	-	38	-
Italy	3/6/ 524	137	480	-	44	-
Germany	440	250	509	69	-	-
Austria	49	5/	44	-	5	-
Czechoslovakia	55	43	56	1	-	-
Poland	3/ 134	5/	134	-	-	-
Balkans	6/ 607	406	618	-	-	-
Total continental Europe	2,746	1,385	2,636	-	-	-
Australia	7/ 49	7/ 78	33	-	16	45
New Zealand	8/ 194	8/224	13	-	193	216

1/ Factory cheese. 2/ Estimated. 3/ Total production. 4/ Less than 500,000 pounds. 5/ Included in total. 6/ Includes cheese made from milk of sheep and goats. 7/ Production year beginning in July. 8/ Production year beginning in August.

Canned Milk

For the 1945-46 consumption year, world supplies of canned milk, especially of unsweetened, are reasonably adequate to meet the effective demand, largely because of the greatly expanded 1945 output in the United States and Canada. The 1946 production in the United States will be reduced about one-sixth, but will continue on a high level. Supplies from this source for world trade will continue to be augmented by some supplies from Canada, New Zealand, and Australia. Limited supplies will be available from Denmark and possibly some from the Netherlands after midyear.

The United States became the chief supplier of canned milk for world trade after mid-1940, when the Netherlands was cut off as a source of supply for the many areas importing this product. Production expanded rapidly during the war, and the output in 1945 was about double the prewar production. Whereas prewar exports of canned milk from the United States had been small since 1925, exports from this country alone during the war jumped to a level exceeding the 1934-38 average of 603 million pounds entering world trade from all sources. The Netherlands had exported nearly half of this volume.

The need for milk in liberated areas of both Europe and Asia has, to a certain extent, supplanted military needs, and total requirements for the current year have continued high. Supplies have been particularly needed in urban areas for infants and children and are now very useful in meeting the current critical food situation in many areas of Europe, where fresh-milk supplies are short of nutritional requirements.

The 1946 output of canned milk in the United States is expected to decline from the peak level of 1945. The decline may reach 800 million pounds, depending upon the domestic demand for cream and other high-return products and also upon the extent to which the demand for foreign shipments can become firm commitments prior to the flush season in production. It is anticipated, however, that exports and shipments from the United States will not exceed 800 million pounds compared to approximately 598 million and 747 million pounds in 1944 and 1945, respectively.

CANNED MILK 1/: Production and trade 1934-1938 and estimated production and exports, 1945-1946.

Country	Estimated production		Domestic disappearance 1934-38	International trade		
				1934-38		Prospective 1945-46
	Average 1934-38	1945-46		Net imports	Net exports	Net exports
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
United States	2,470	4,200	-	-	33	800
Canada	92	230	-	-	23	70
Cuba	33	24	-	4	-	-
Argentina	n.a.	8	-	-	-	1
United Kingdom	379	242	-	168	-	-
Denmark	41	-	-	-	40	6
Netherlands	305	72	-	-	2/ 356	-
France	29	24	-	-	6	0
Switzerland	14	10	-	-	13	0
Australia	39	100	-	-	16	50
New Zealand	11	18	-	-	22	16

1/ Total including that sweetened or unsweetened made from whole or skim milk.
2/ Prior to 1937 export figures represented gross weight.
n.a. = not available.

Dried Milk

Dried-milk production in 1945 reached 1,100 million pounds in the five important producing countries of the United States, United Kingdom, Canada, Australia, and New Zealand, compared to an average prewar output of 295 million pounds. This production is largely of nonfat milk solids, which have developed during the war as an important means of meeting certain dietary needs.

Production has been adequate for most requirements, but despite the high production, markets continue reasonably firm. As production of fluid cream and possibly of butter is stepped up in the United States, the production of dried skim milk may approach demand at current prices.

Supplies of dried milk available for export in 1945-46 from producing countries are expected to total about 400 million pounds. About 350 million pounds of this will be available from the United States and the remainder from Canada, Australia, New Zealand, and Argentina. An average of 68 million pounds of dried milk entered world trade in the prewar period 1934-38. Most of these exports were from the Netherlands and New Zealand.

Most of the supplies for export in the current year will go to the United Kingdom and to liberated areas in Europe and the Far East. Sizeable quantities will also move as commercial shipments to tropical and other areas with limited milk supplies.

DRIED MILK 1/: Production and trade 1934-1938 and estimated production and exports, 1945-1946.

Country	Production		Domestic disappearance	International trade		
				1934-38		Prospective 1945-46
	Average 1934-38	Estimated 1945-46	1934-38	Net imports	Net exports	Net exports
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
United States	204	800	n.a.	1	0	350
Canada	23	50	"	-	4	10
Argentina	n.a.	12	"	-	2/	5
United Kingdom	34	70	"	29	-	0
France	8	33	"	-	1	0
Netherlands	56	20	"	-	37	0
Australia	17	47	"	-	3	9
New Zealand	17	30	"	-	16	25

1/ Total dried whole milk and dried skim milk for human consumption.
2/ Less than 500,000 pounds.
n.a. = not available.

Eggs

Egg supplies have continued short of demand during the past 6 months even in the United States and Canada, where production has been on a high level. The generally short supplies of protein foods have increased consumption wherever egg supplies have been available. The large stocks of dried eggs accumulated in 1943 and 1944 have been utilized in food-deficit areas of the world, and egg stocks at the end of 1945 were at an exceedingly low level compared with war years.

In 1946 world egg production will be somewhat less than last year and about 5 percent below prewar (1934-38) average production. High levels of production in the United States and Canada, about 20 billion eggs above prewar, nearly offset the large wartime decline in Europe. These two continents produce nearly three-fourths of the world production of eggs.

Supplies of eggs in 1946 for movement into importing countries are expected to exceed 6 billion in shell equivalent. These will come largely from the United States, Canada, Argentina, Eire, Denmark, and

Australia. About two-thirds of these prospective supplies will be available from the United States.

Production in Canada in 1946 is expected to be nearly 4.6 billion eggs. Of these, 3.5 billion will be domestically consumed, leaving about 1.1 billion for export. These will move largely to the United Kingdom, with approximately 60 percent in shell form and the balance dried.

Egg production in the United States in 1946 is estimated at 53 to 54 billion eggs. The supply of meat and other protein foods, together with relative consumer purchasing ability, will determine domestic consumption, but per capita consumption is expected to be under the peak rate of 390 eggs reached in 1945. Some 4 billion eggs are expected to be available for export. Most of these will be dried, but if buying nations make the necessary financial and procurement arrangements sufficiently in advance, part of the supply could move in shell form from the larger organizations equipped with facilities for export packing.

The United Kingdom will have available this year only about 4.5 billion shell eggs compared to a prewar average of 7.8 billion, unless appreciable quantities of eggs move from the United States in shell form. About 2.1 billion shell eggs were imported annually from continental Europe before the war. The balance of the decrease in available supplies of shell eggs is due to a decline of about one-third in domestic production. Total consumption of eggs in the United Kingdom, however, was maintained in 1945 at near prewar levels by stocks from previous years and by large imports of dried eggs from the United States. A shell-egg equivalent of 200 eggs per person was consumed in the United Kingdom in 1945 compared to an average of 195 annually in the period 1935-1939. This is approximately one-half of the 1945 consumption rate in the United States. As lack of available feed supplies in Europe will prevent any appreciable export of eggs to the United Kingdom before 1948, substantial quantities of eggs will have to move from the United States if present consumption is to be maintained in the United Kingdom. Supplies from this source may be available in 1946, but if present unfavorable egg-feed price ratios continue, supplies in 1947 are much less certain. In both years available supplies will be greatly dependent upon United States demand.

Consumption of eggs in Europe in 1945-46 will be between 17 and 18 billion eggs less than in the 5-year period 1934-38. This is a result of a decline of approximately 50 percent in total egg production. Indicated short supplies of feed do not point to a large recovery within the next year. The countries with the smallest current supplies of eggs in relation to prewar consumption are Finland, Norway, Netherlands, Belgium, Switzerland, and Poland.

Short supplies of grain in North Africa, due to droughts, eliminate this region as a current source of eggs for European countries. The Union of South Africa is expected to export about 8 million eggs to the United Kingdom in the first half of 1946.

EGGS: Production and trade 1934-1938, and estimated production and exports 1945-46.

Country and region	Estimated production		Apparent domestic disappearance	International trade 1/		
				1934-38		Prospective 1945-46
	Average 1934-38	1945-46	1934 to 1938	Net imports	Net exports	Net exports
	Million eggs	Million eggs	Million eggs	Million eggs	Million eggs	Million eggs
United States	35,498	54,000	35,482	2/	16	4,000
Canada	2,630	4,600	2,612	-	18	1,039
Cuba	320	324	320	-	-	0
Argentina	n.a.				67	540
United Kingdom 3/	5,098	3,416	7,783	4/2,685	-	-
Eire	1,086	800	-	-	358	200
Finland	317	143	174	-	143	0
Norway	369	-	349	-	20	0
Sweden	900	900	843	-	57	0
Denmark	1,979	935	605	-	1,374	226
Netherlands	1,978	835	727	5/	1,251	0
Belgium	1,702	-	1,524	5/	178	0
France	6,200	4,000	6,364	5/ 164	-	-
Spain	1,700	1,600	2,300	600	-	-
Switzerland	423	210	673	250	-	-
Italy	5,600	3,100	5,701	5/ 101	-	-
Germany	6,585	-	7,947	5/1,362	-	-
Austria	663	5,185	643	-	20	0
Czechoslovakia	1,958	-	2,044	86	-	-
Poland	3,500	-	3,063	-	437	0
Balkans	5,100	2,617	4,300	-	700	0
Total continental Europe	38,974	19,525	37,258	-	-	-
Algeria	n.a.	n.a.	-	-	34	0
French Morocco	n.a.	n.a.	-	-	188	0
Egypt	n.a.	n.a.	-	-	69	0
Union of South Africa	n.a.	n.a.	-	-	43	8
China	n.a.	-	-	-	6/333	0
Australia	708	1,380	525	-	183	288

1/Trade shown only for shell eggs. 2/Imports of dried-egg products averaged nearly 2 million pounds. 3/Total production. 4/An additional 95 million pounds of egg products were imported. 5/Appreciable quantities of egg products imported. 6/An average of 123 million pounds of egg products also exported. N.A. = not available.

China continues out of the egg export market and production there is estimated to have declined at least to the extent of the quantities previously exported. Adequate domestic supplies are at present reported in some regions of China.

In Australia, egg production has increased appreciably during the war, and exports during the current season are expected to reach an equivalent of 288 million eggs. On the other hand, egg production in New Zealand is reported short of demand.

Under the stimulus of considerably higher prices, exports of eggs from Argentina during the current season (July through June) are expected to reach 540 million eggs, exceeding shipments during the preceding season of 1944-45 by as much as 16 percent. About 75 percent of these exports will move in dried form and the rest as shell eggs. From two-thirds to three-fourths of the exports will be shipped to the United Kingdom, and the remainder will go largely to France and Belgium.

Approved by Outlook and Situation
Board, February 6, 1946

FRANCE: Food Balance

Population: Prewar 41,900,000

Foodstuff	Average 1933/34 - 1937/38											
	Supply				Utilization						Consumption of food per person	
	Production	Net trade	Movement of stocks	Total supply	Seed and waste	Feed	Food	Extract. rate	Feed in terms of flour	Industrial uses	Gross	Net a/
	1,000 metric tons										Kilograms	
Wheat	8,155	+165	b/	8,320	1,200	210	6,900	72%	4,970	10	164.7	118.4
Rye	787	+1	-	788	140	318	330	75%	250	-	7.9	6.0
Barley	1,045	+185	-	1,230	145	660	25	60%	15	400	.6	.4
Oats	4,615	+34	-	4,649	595	4,029	25	60%	15	-	.6	.4
Corn	513	+688	-	1,201	30	1,021	50	90%	45	100	1.2	1.1
Rice	-	+602	-	602	-	292	250	-	270	60	6.0	6.0
Maslin	94	-	-	94	9	45	40	75%	30	-	.9	.7
Spelt c/	-	-	-	-	-	-	-	-	-	-	-	-
Buckwheat	298	-	-	298	30	178	90	75%	68	-	2.1	1.6
Millet) Other cereals)	10	+28	-	38	1	27	10	75%	7	-	.2	.2
Total cereals (incl. rice)	15,517	+1,703	-	17,220	2,150	6,780	7,720	-	5,650	570	184.2	134.8
Potatoes	15,385	+65	-	15,450	4,570	5,380	5,000	-	-	500	119.3	-
Sugar beets	9,359	-	-	-	-	-	-	-	-	-	-	-
Sugar (refined basis)	830	+135	-	965	-	-	965	-	-	-	23.0	-
Dry legumes	235	+140	-	375	40	75	260	-	-	-	-	6.2
Fresh vegetables	5,000	+115	-	5,115	1,015	-	4,100	-	-	-	-	97.8
Fruits (in terms of fresh) d/	625	+665	-	1,290	190	-	1,100	-	-	-	-	26.2
Nuts	150	+4	-	154	-	-	154	-	-	-	3.7	-
Beef and veal	835	+18	-	853	-	-	853	-	-	-	20.4	-
Pork	540	+7	-	547	-	-	547	-	-	-	13.0	-
Mutton and lamb	80	+23	-	103	-	-	103	-	-	-	2.5	-
Rabbit	120	-	-	120	-	-	120	-	-	-	2.9	-
Goat meat e/	-	-	-	-	-	-	-	-	-	-	-	-
Horse meat	45	+2	-	47	-	-	47	-	-	-	1.1	-
Poultry	180	-	-	180	-	-	180	-	-	-	4.3	-
Game	-	-	-	-	-	-	-	-	-	-	-	-
Meat offals	90	-	-	90	-	-	90	-	-	-	2.1	-
Total meat and poultry (carcass weight)	1,890	+50	-	1,940	-	-	1,940	-	-	-	46.3	-
Fish	346	+10	-	356	-	-	356	-	-	-	8.5	-
Butter	225	-2	-	223	-	-	223	-	-	-	5.3	-
Slaughter fats	185	-6	-	179	-	-	150	-	-	29	3.6	-
Vegetable oils	15	+540	-	555	-	-	340	-	-	215	8.1	-
Fish oils	-	+3	-	3	-	-	3	-	-	-	.1	-
Total fats and oils	425	+535	-	960	-	-	716	-	-	244	17.1	-
Cheese	280	+2	-	282	-	-	282	-	-	-	6.7	-
Whole milk f/	3,580	-30	-	3,550	-	-	3,550	-	-	-	84.7	-
Skimmed milk	250	-	-	250	-	-	250	-	-	-	6.0	-
Eggs	360	+16	-	376	-	-	376	-	-	-	9.0	-
Alcohol g/	775	+125	-	900	-	-	900	-	-	-	21.5	-

	Milk balance						Skimmed milk			
	Production	Feed h/	Fresh cons.	For butter	For cheese	Other uses	Production	Feed	Food	Other uses
	1,000 metric tons									
Cow's	13,850	3,300	3,410	4,850	2,450	170	4,000	3,250	250	500
Sheep and goat's	330									

Office of Foreign Agricultural Relations, partly based on official statistics, partly estimated.

a/ Grains in terms of flour, other foodstuffs retail weight.
b/ Stocks decreased heavily during this period. While the extent of the decline is not known precisely, information available indicates that the decline was more or less offset by much higher-than-normal use of wheat as feed.
c/ Included with wheat.
d/ Excludes apples and pears for cider.
e/ Included with mutton and lamb.
f/ Includes cream and processed milk in terms of whole milk.
g/ Alcohol content of wine, beer, and cider.
h/ Excludes quantities fed lambs and kids.

BELGIUM: Food Balance

Population: Prewar 8,330,000

Foodstuff	Average 1933/34 - 1937/38											
	Supply				Utilization							
	Production	Net trade	Movement of stocks	Total supply	Seed and waste	Feed	Food	Extract. rate	Food in terms of flour	Industrial uses	Consumption of food per person: Gross	Consumption of food per person: Net a/
	1,000 metric tons										Kilograms	
Wheat	450	+1,050	-	1,500	50	198	1,202	75%	902	50	144.3	108.3
Rye	424	+143	-	567	42	405	107	72%	77	13	12.8	9.2
Barley	91	+415	-	506	9	282	15	65%	10	200	1.8	1.2
Oats	655	+37	-	692	66	611	15	55%	8	-	1.8	1.0
Corn	-	+770	-	770	-	620	8	75%	6	142	1.0	0.7
Rice	-	+51	-	51	-	6	45	-	45	-	5.4	5.4
Maslin / Spelt	37	-	-	37	4	33	-	-	-	-	-	-
Buckwheat	1	-	-	1	-	1	-	-	-	-	-	-
Millet	-	-	-	-	-	-	-	-	-	-	-	-
Other cereals	-	-	-	-	-	-	-	-	-	-	-	-
Total cereals (incl. rice)	1,658	+2,466	-	4,124	171	2,156	1,392	-	1,048	405	167.1	125.8
Potatoes	3,169	+40	-	3,209	634	1,215	1,260	-	-	100	151.3	-
Sugar beets	1,459	-	-	1,459	-	-	-	-	-	1,459	-	-
Sugar (refined basis)	213	+28	-	241	-	9	232	-	-	-	27.9	-
Dry legumes	51	+37	-	88	5	58	25	-	-	-	3.0	-
Fresh vegetables	400	b/	-	400	-	-	400	-	-	-	48.0	-
Fruits (in terms of fresh)	160	+107	-	267	-	-	267	-	-	-	32.0	-
Nuts												
Beef and veal	138	+10	-	148	-	-	148	-	-	-	17.8	-
Pork	167	+1	-	168	-	-	168	-	-	-	20.2	-
Mutton and lamb	3	+1	-	4	-	-	4	-	-	-	0.5	-
Rabbit c/												
Goat meat / Horse meat	7	+9	-	16	-	-	16	-	-	-	1.9	-
Poultry / Game	45	-	-	45	-	-	45	-	-	-	5.4	-
Meat offals	-	-	-	-	-	-	-	-	-	-	-	-
Total meat and poultry (carcass weight)	360	+21	-	381	-	-	381	-	-	-	45.8	-
Fish	37	+56	-	93	-	-	93	-	-	-	11.2	-
Butter	64	+5	-	69	-	-	69	-	-	-	8.3	-
Slaughter fats and lard	37	+6	-	43	-	-	43	-	-	-	5.1	-
Vegetable oils	-	d/+108	-	108	-	-	49	-	-	59	5.9	-
Fish oils	-	+4	-	4	-	-	4	-	-	-	0.5	-
Total fats and oils	101	+123	-	224	-	-	165	-	-	59	19.8	-
Cheese	27	+22	-	49	-	-	49	-	-	-	5.9	-
Whole milk	640	+20	-	660	-	-	660	-	-	-	79.2	-
Skimmed milk	-	-	-	-	-	-	-	-	-	-	-	-
Eggs	106	-11	-	95	-	-	95	-	-	-	11.4	-
Beer	340	e/+1,086	-	1,426	-	-	1,426	-	-	-	171.2	-
Alcohol in other beverages	11	-6	-	5	-	-	5	-	-	-	0.6	-
Cocoa	-	+9	-	9	-	-	9	-	-	-	1.1	-

	Milk balance								Skimmed milk			
	Production	Net import	Total	Feed	Fresh cons.	For butter	For cheese	Other uses	Production	Feed	Food	Other uses
	1,000 metric tons											
Cow's	3,000	+20	3,020	360	660	1,800	200	-	1,550	1,000	-	550

Office of Foreign Agricultural Relations, partly based on official statistics, partly estimated.

a/ Grains in terms of flour; other foodstuffs, retail weight.
b/ Imports and exports about 50,000 tons.
c/ Included with poultry and game.
d/ Oil from imported seed 96,000 tons, oils as such 12,000 tons.
e/ Produced domestically from imported grain.

THE NETHERLANDS: Food Balance

Population: Prewar 8,500,000

Foodstuff	Average 1933/34 - 1937/38											
	Supply				Utilization							
	Production	Net trade	Movement of stocks	Total supply	Seed and waste	Feed	Food	Extract. rate	Food in terms of flour	Industrial uses	Consumption of food per person: Gross	Consumption of food per person: Net a/
	1,000 metric tons										Kilograms	
Wheat	425	+590	-	1,015	37	50	914	75%	686	14	107.5	80.7
Rye	468	+65	-	533	39	376	118	72%	85	-	13.9	10.0
Barley	104	+304	-	408	7	320	26	55%	14	55	3.1	1.6
Oats	326	+27	-	353	23	279	51	60%	31	-	6.0	3.7
Corn	-	+999	-	999	-	948	1	65%	1	50	.1	0.1
Rice	-	+60	-	60	-	13	43	-	43	4	5.1	5.1
Maslin	-	-	-	-	-	-	-	-	-	-	-	-
Spelt	-	-	-	-	-	-	-	-	-	-	-	-
Buckwheat	b/	+24	-	24	-	24	-	-	-	-	-	-
Millet	-	-	-	-	-	-	-	-	-	-	-	-
Other cereals	-	+15	-	15	-	8	7	75%	5	-	.8	0.6
Total cereals (incl. rice)	1,323	+2,084	-	3,407	106	2,018	1,160	-	865	123	136.5	101.8
Potatoes	3,066	-293	-	2,773	432	540	1,105	-	-	696	130.0	-
Sugar beets	1,696	-	-	1,696	-	-	-	-	-	1,696	-	-
Sugar (refined basis)	227	+62	-	289	-	-	289	-	-	-	34.0	-
Dry legumes	146	-20	-	126	14	87	25	-	-	-	2.9	-
Fresh vegetables	909	-299	-	610	-	-	610	-	-	-	71.8	-
Fruits (in terms of fresh)	297	+223	-	520	-	-	520	-	-	-	61.2	-
Nuts	11	+2	-	13	-	-	13	-	-	-	1.5	-
Beef and veal	137	+1	-	138	-	-	138	-	-	-	16.2	-
Pork	194	-37	-	157	-	-	157	-	-	-	18.5	-
Mutton and lamb	9	-2	-	7	-	-	7	-	-	-	0.8	-
Rabbit	-	-	-	-	-	-	-	-	-	-	-	-
Goat meat) Horse meat)	5	-2	-	3	-	-	3	-	-	-	0.4	-
Poultry	26	-3	-	23	-	-	23	-	-	-	2.7	-
Game	-	-	-									
Meat offals	21	-2	-	19	-	-	19	-	-	-	2.2	-
Total meat and poultry (carcass weight)	392	-45	-	347	-	-	347	-	-	-	40.8	-
Fish	213	-117	-	96	-	-	96	-	-	-	11.3	-
Butter	95	-41	-	54	-	-	54	-	-	-	6.3	-
Slaughter fats	63	-4	-	59	-	-	44	-	-	15	5.2	-
Vegetable oils	4	+135	-	139	-	-	87	-	-	52	10.2	-
Fish oils	-	+26	-	26	-	-	16	-	-	10	1.9	-
Total fats and oils	162	+116	-	278	-	-	201	-	-	77	23.6	-
Cheese	121	-59	-	62	-	-	62	-	-	-	7.3	-
Whole milk	1,293	-185	-	1,108	-	-	1,108	-	-	-	130.4	-
Skimmed milk	-	-	-	-	-	-	-	-	-	-	-	-
Eggs	126	-52	-	74	2	-	72	-	-	-	8.5	-
Beer	141	-5	-	136	-	-	136	-	-	-	16.0	-
Alcohol in other beverages	28	-20	-	8	-	-	8	-	-	-	0.9	-
Cocoa	-	+2	-	2	-	-	2	-	-	-	0.2	-

	Milk balance									Skimmed milk			
	Production	Trade	Total	Feed	Supply	Fresh cons.	For butter	For cheese	Other uses	Production	Feed	Food	Other uses
	1,000 metric tons												
Cow's	5,075	-4	5,071	232	4,839	1,053	2,511	1,039	236	2,160	1,531	-	629

Office of Foreign Agricultural Relations, partly based on official statistics, partly estimated.

a/ In terms of flour.
b/ Less than 500 tons.

DENMARK: Food Balance

Population: Prewar 3,706,000

Foodstuff	Average 1933/34 - 1937/38											
	Supply				Utilization							
	Production	Net trade	Movement of stocks	Total supply	Seed and waste	Feed	Food	Extract. rate	Food in terms of flour	Industrial uses	Consumption of food per person: Gross	Consumption of food per person: Net a/
	1,000 metric tons										Kilograms	
Wheat	347	+301	-	648	31	379	238	72.6%	173	-	64.2	46.7
Rye	252	+193	-	445	30	242	173	90%	156	-	46.7	42.1
Barley	1,004	-28	-	976	83	835	11	65%	7	47	3.0	1.9
Oats	978	+17	-	995	87	889	19	60%	11	-	5.1	3.0
Corn	-	+356	-	356	-	352	-	-	-	4	-	-
Rice	-	+11	-	11	-	-	11	-	11	-	3.0	3.0
Maslin	769	-	-	769	73	696	-	-	-	-	-	-
Spelt	-	-	-	-	-	-	-	-	-	-	-	-
Buckwheat	-	-	-	-	-	-	-	-	-	-	-	-
Millet	-	-	-	-	-	-	-	-	-	-	-	-
Other cereals	-	-	-	-	-	-	-	-	-	-	-	-
Total cereals (incl. rice)	3,350	+850	-	4,200	304	3,393	452	-	358	51	122.0	96.7
Potatoes	1,306	-14	-	1,292	320	579	365	-	-	28	98.5	-
Sugar beets	1,339	-	-									
Sugar (refined basis)	182	+3	-	185	-	-	185	-	-	-	49.9	-
Dry legumes	8	+2	-	10	1	7	2	-	-	-	.5	-
Fresh vegetables	148	-	-	148	24	-	124	-	-	-	39.9	33.4
Fruits (in terms of fresh)	82	+30	-	112	-	-	112	-	-	-	30.2	-
Nuts												
Beef and veal	169	-43	-	126	-	-	107	-	-	19	28.8	-
Pork	346	-229	-	117	-	-	117	-	-	-	31.6	-
Mutton and lamb	4	-	-	4	-	-	4	-	-	-	1.1	-
Rabbit) Goat meat)	-	-	-	-	-	-	-	-	-	-	-	-
Horse meat	-	-	-	-	-	-	-	-	-	-	-	-
Poultry	14	-2	-	12	-	-	12	-	-	-	3.2	-
Game	-	-	-	-	-	-	-	-	-	-	-	-
Meat offals	20	-7	-	13	-	-	13	-	-	-	3.5	-
Total meat and poultry (carcass weight)	553	-281	-	272	-	-	253	-	-	19	68.2	-
Fish	89	-34	-	55	-	-	55	-	-	-	14.8	-
Butter	181	-148	-	33	-	-	33	-	-	-	8.9	-
Slaughter fats	36	-16	-	20	-	-	8	-	-	12	2.2	-
Vegetable oils	-	+75	-	75	-	-	42	-	-	33	11.3	-
Fish oils	3	+15	-	18	-	-	14	-	-	4	3.8	-
Total fats and oils	220	-74	-	146	-	-	97	-	-	49	26.2	-
Cheese	29	-8	-	21	-	-	21	-	-	-	5.7	-
Whole milk	650	-	-	650	-	-	650	-	-	-	175.4	-
Skimmed milk	50	-	-	50	-	-	50	-	-	-	13.5	-
Eggs	106	-76	-	30	-	-	30	-	-	-	8.1	-

	Milk balance						Skimmed milk			
	Production	Feed	Fresh cons.	For butter	For cheese	Other uses	Production	Feed	Food	Other uses
	1,000 metric tons									
Cow's	5,300	250	650	4,225	150	25	3,634	3,402	50	182

Office of Foreign Agricultural Relations, partly based on official statistics, partly estimated.

a/ Grains in terms of flour; other foodstuffs, retail weight.

NORWAY: Food Balance

Population: Prewar 2,880,000

Foodstuff	Average 1933/34 - 1937/38											
	Supply				Utilization						Consumption of food per person	
	Production	Net trade	Movement of stocks	Total supply	Seed and waste	Feed	Food	Extract. rate	Food in terms of flour	Industrial uses	Gross	Net a/
	1,000 metric tons										Kilograms	
Wheat	46	+226	-	272	6	25	241	75%	181	-	83.7	62.8
Rye	11	+134	-	145	1	8	136	71%	96	-	47.2	33.3
Barley	120	+17	-	137	16	98	12	65%	8	11	4.2	2.8
Oats	186	+2	-	188	26	149	13	53%	7	-	4.5	2.4
Corn	-	+146	-	146	-	143	3	67%	2	-	1.0	0.7
Rice	-	+5	-	5	-	-	5	-	5	-	1.7	1.7
Maslin b/	-	-	-	-	-	-	-	-	-	-	-	-
Spelt	-	-	-	-	-	-	-	-	-	-	-	-
Buckwheat	-	-	-	-	-	-	-	-	-	-	-	-
Millet	-	-	-	-	-	-	-	-	-	-	-	-
Other cereals	-	-	-	-	-	-	-	-	-	-	-	-
Total cereals (incl. rice)	363	+530	-	893	49	423	410	-	299	11	142.3	103.7
Potatoes	900	-1	-	899	208	331	338	-	-	22	117.4	-
Sugar beets												
Sugar (refined basis)	-	+96	-	96	-	-	96	-	-	-	33.3	-
Dry legumes	2	+6	-	8	-	-	8	-	-	-	2.8	-
Fresh vegetables	66	+15	-	81	12	-	69	-	-	-	28.1	23.9
Fruits (in terms of fresh)	57	+40	-	97	12	-	85	-	-	-	33.7	29.5
Nuts												
Beef and veal	42	-	-	42	-	-	42	-	-	-	14.6	-
Pork	40	-1	-	39	-	-	39	-	-	-	13.5	-
Mutton and lamb	15	+1	-	16	-	-	16	-	-	-	5.6	-
Rabbit) Goat meat)	4	+2	-	6	-	-	6	-	-	-	2.1	-
Horse meat	2	-	-	2	-	-	2	-	-	-	.7	-
Poultry	3	-	-	3	-	-	3	-	-	-	1.0	-
Game c/	-	-	-	-	-	-	-	-	-	-	-	-
Meat offals	2	-	-	2	-	-	2	-	-	-	.7	-
Total meat and poultry (carcass weight)	108	+2	-	110	-	-	110	-	-	-	38.2	-
Fish	534	-423	-	111	-	-	111	-	-	-	38.5	-
Butter	20	-	-	20	-	-	20	-	-	-	6.9	-
Slaughter fats	7	-	-	7	-	-	6	-	-	1	2.1	-
Vegetable oils	-	+33	-	33	-	-	31	-	-	2	10.8	-
Fish oils	225	-192	-	33	-	-	11	-	-	22	3.8	-
Total fats and oils	252	-159	-	93	-	-	68	-	-	25	23.6	-
Cheese	24	-2	-	22	-	-	22	-	-	-	7.6	-
Whole milk	510	-	-	510	-	-	510	-	-	-	177.1	-
Skimmed milk	58	-	-	58	-	-	58	-	-	-	20.1	-
Eggs	21	-1	-	20	-	-	20	-	-	-	6.9	-

	Milk balance						Skimmed milk			
	Production	Feed	Fresh cons.	For butter	For cheese	Other uses	Production	Feed	Food	Other uses
	1,000 metric tons									
Cow's	1,340)	75	510	504	260	24	433	300	58	75
Goat's	33)									

Office of Foreign Agricultural Relations, partly based on official statistics, partly estimated.

a/ Grains in terms of flour; other foodstuffs, retail weight.
b/ Included with barley and oats.
c/ Included with rabbit and goat meat.

SWEDEN: Food Balance

Population: Prewar 6,249,000

Foodstuff	Average 1933/34 - 1937/38											
	Supply				Utilization							
	Production	Net trade	Movement of stocks a/	Total supply	Seed and waste	Feed	Food	Extraction rate	Food in terms of flour	Industrial uses	Consumption of food per person: Gross	Consumption of food per person: Net b/
	1,000 metric tons										Kilograms	
Wheat	672	+7	+14	665	82	101	482	76.4%	368	-	77.1	58.9
Rye	439	-23	+5	411	58	128	225	90%	203	-	36.0	32.5
Barley	205	-	-	205	27	130	7	60%	4	41	1.1	0.6
Oats	1,207	+29	-	1,236	184	988	64	50%	32	-	10.2	5.1
Corn	-	+135	-	135	-	128	7	71%	5	-	1.1	0.8
Rice	-	+12	-	12	-	-	12	-	12	-	1.9	1.9
Maslin	529	-	-	529	68	461	-	-	-	-	-	-
Spelt	-	-	-	-	-	-	-	-	-	-	-	-
Buckwheat	-	-	-	-	-	-	-	-	-	-	-	-
Millet	-	-	-	-	-	-	-	-	-	-	-	-
Other cereals	-	-	-	-	-	-	-	-	-	-	-	-
Total cereals (incl. rice)	3,052	+160	+19	3,193	419	1,936	797	-	624	41	127.4	99.8
Potatoes	1,883	+4	-	1,887	427	500	860	-	-	100	137.6	-
Sugar beets												
Sugar (refined basis)	256	+13	-	269	-	-	269	-	-	-	43.0	-
Dry legumes	40	-1	-	39	7	21	11	-	-	-	1.8	-
Fresh vegetables	125	+6	-	131	21	-	110	-	-	-	21.0	17.6
Fruits (in terms of fresh)	125	+85	-	210	25	-	185	-	-	-	33.6	29.6
Nuts												
Beef and veal	107	-2	-	105	-	-	105	-	-	-	16.8	-
Pork	154	-16	-	138	-	-	138	-	-	-	22.1	-
Mutton and lamb	4	-	-	4	-	-	4	-	-	-	.6	-
Rabbit) Goat meat)	-	-	-	-	-	-	-	-	-	-	-	-
Horse meat	6	-	-	6	-	-	6	-	-	-	1.0	-
Poultry	10	-	-	10	-	-	10	-	-	-	1.6	-
Game	-	-	-	-	-	-	-	-	-	-	-	-
Meat offals	10	-	-	10	-	-	10	-	-	-	1.6	-
Total meat and poultry (carcass weight)	291	+18	-	273	-	-	273	-	-	-	43.7	-
Fish	108	+32	-	140	-	-	140	-	-	-	22.4	-
Butter	75	-21	-	54	-	-	54	-	-	-	8.6	-
Slaughter fats	12	+2	-	14	-	-	14	-	-	-	2.2	-
Vegetable oils	-	+96	-	96	-	-	32	-	-	64	5.1	-
Fish oils	-	+13	-	13	-	-	13	-	-	-	2.1	-
Total fats and oils	87	+90	-	177	-	-	113	-	-	64	18.0	-
Cheese	38	-	-	38	-	-	38	-	-	-	6.1	-
Whole milk	1,489	-	-	1,489	-	-	1,489	-	-	-	238.3	-
Skimmed milk	170	-	-	170	-	-	170	-	-	-	27.2	-
Eggs	50	-3	-	47	-	-	47	-	-	-	7.5	-

	Milk balance							Skimmed milk		
	Production	Feed	Fresh cons.	For butter	For cheese	Other uses	Production	Feed	Food	Other uses
	1,000 metric tons									
Cow's	4,644	900	1,489	1,880	355	20	1,617	1,347	170	100

Office of Foreign Agricultural Relations, partly based on official statistics, partly estimated.

a/ The plus is increase, the minus decrease in stocks, which must be deducted and added, respectively.
b/ Grains in terms of flour; other foodstuffs, retail weight.

FINLAND: Food Balance

Population: Prewar 3,570,000 a/

Foodstuff	Average 1933/34 - 1937/38											
	Supply				Utilization							
	Production	Net trade	Movement of stocks	Total supply	Seed and waste	Feed	Food	Extract. rate	Food in terms of flour	Industrial uses	Consumption of food per person: Gross	Consumption of food per person: Net b/
	1,000 metric tons										Kilograms	
Wheat	125	111	-	236	20	6	210	75%	157	-	58.8	44.0
Rye	371	48	-	419	45	37	336	97%	326	1	94.1	91.3
Barley	183	1	-	184	30	92	57	57%	33	5	16.0	9.2
Oats	688	14	-	702	110	585	7	50%	4	-	2.0	1.1
Corn	-	67	-	67	-	67	-	-	-	-	-	-
Rice	-	13	-	13	-	-	13	-	13	-	3.6	3.6
Maslin	22	-	-	22	2	20	-	-	-	-	-	-
Total cereals (incl. rice)	1,389	254	-	1,643	207	807	623	-	533	6	174.5	149.2
Potatoes	1,302	3	-	1,305	269	345	650	-	-	41	182.1	-
Sugar (refined basis)	10	92	-	102	-	-	102	-	-	-	28.6	-
Dry legumes	19	-	-	19	3	4	12	-	-	-	3.4	-
Fresh vegetables	71	-	-	71	-	-	71	-	-	-	19.9	-
Fruits (in terms of fresh)	25	23	-	48	4	-	44	-	-	-	12.3	-
Beef and veal	65	-1	-	64	-	-	64	-	-	-	17.9	-
Pork c/	47	-3	-	44	-	-	44	-	-	-	12.3	-
Mutton and lamb	5	-	-	5	-	-	5	-	-	-	1.4	-
Poultry	2	-	-	2	-	-	2	-	-	-	.6	-
Total meat and poultry (carcass weight)	119	-4	-	115	-	-	115	-	-	-	32.2	-
Fish	35	-1	-	34	-	-	34	-	-	-	9.5	-
Butter	46	-12	-	34	-	-	d/ 28	-	-	-	d/ 7.9	-
Slaughter fats	3	1	-	4	-	-	d/ 3	-	-	-	d/ .8	-
Vegetable oils	-	10	-	10	-	-	10	-	-	-	2.8	-
Total fats and oils	49	-1	-	48	-	-	d/ 41	-	-	-	d/11.5	-
Cheese	8	-5	-	3	-	-	3	-	-	-	.8	-
Whole milk	990	-	-	990	-	-	990	-	-	-	277.3	-
Eggs	18	-8	-	10	-	-	10	-	-	-	2.8	-

	Milk balance				
	Production	Feed	Fresh cons.	For butter	For cheese
	1,000 metric tons				
Cow's	2,200	44	990	1,078	88

Office of Foreign Agricultural Relations. January 1946.

a/ Resident population.
b/ In terms of flour.
c/ Fat pork included with meat.
d/ In terms of pure fat.

GERMANY: Food Balance

Population: Prewar 67,100,000

Foodstuff	Average 1933/34 - 1937/38											
	Supply				Utilization							
	Production	Net trade	Movement of a/ stocks	Total supply	Seed and waste	Feed	Food	Extract. rate	Food in terms of flour	Industrial uses	Consumption of food per person: Gross	Consumption of food per person: Net b/
	1,000 metric tons										Kilograms	
Wheat	4,866	+400	+87	5,179	527	252	4,400	76.1%	3,350	-	65.6	49.9
Rye	7,623	+48	+185	7,486	907	1,669	4,810	75.2%	3,617	100	71.7	53.9
Barley	3,419	+401	+118	3,702	350	2,145	80	62.5%	50	1,127	1.2	0.8
Oats	5,617	+69	-1	5,687	595	5,017	75	66.7%	50	-	1.1	0.7
Corn	36	+787	+261	562	2	503	c/	-	-	57	-	-
Rice	-	+168	-	168	-	-	168	-	168	-	2.5	2.5
Maslin	885	+31	-	916	106	810	-	-	-	-	-	-
Spelt d/	-	-	-	-	-	-	-	-	-	-	-	-
Buckwheat	-	-	-	-	-	-	-	-	-	-	-	-
Millet	-	-	-	-	-	-	-	-	-	-	-	-
Other cereals	-	-	-	-	-	-	-	-	-	-	-	-
Total cereals (incl. rice)	22,446	+1,904	+650	23,700	2,487	10,396	9,533	-	7,235	1,284	142.1	107.8
Potatoes	45,675	+68	+12	45,731	10,683	18,840	12,680	-	-	3,528	189.0	-
Sugar beets												
Sugar (refined basis)	1,450	-	-	1,450	-	-	1,450	-	-	-	21.6	-
Dry legumes	100	+56	-	156	-	-	156	-	-	-	2.3	-
Fresh vegetables	3,560	+268	-	3,828	587	-	3,241	-	-	-	57.0	48.3
Fruits (in terms of fresh)	2,300	+927	-	3,227	422	-	2,805	-	-	-	48.1	41.8
Nuts	18	+39	-	57	-	-	57	-	-	-	.8	-
Beef and veal	1,015	+36	-	1,051	105	-	946	-	-	-	15.7	14.1
Pork	1,730	+34	-	1,764	176	-	1,588	-	-	-	26.3	23.7
Mutton and lamb	37	-	-	37	4	-	33	-	-	-	.5	.5
Rabbit	51	-	-	51	6	-	45	-	-	-	.8	.7
Goat meat	11	-	-	11	1	-	10	-	-	-	.2	.1
Horse meat	29	-	-	29	3	-	26	-	-	-	.4	.4
Poultry	72	+30	-	102	10	-	92	-	-	-	1.5	1.4
Game	24	+4	-	28	3	-	25	-	-	-	.4	.3
Meat offals	112	+2	-	114	11	-	103	-	-	-	1.7	1.5
Total meat and poultry e/ (carcass weight)	3,081	+106	-	3,187	319	-	2,868	-	-	-	47.5	42.7
Fish	587	+214	-	801	-	-	771	-	-	30	11.5	-
Butter	473	+71	-	544	-	-	544	-	-	-	8.1	-
Slaughter fats	528	+60	-	588	-	-	588	-	-	-	8.8	-
Vegetable oils	39	+587	-	626	-	-	626	-	-	-	9.3	-
Fish oils	-											
Total fats and oils (edible)	1,040	+718	-	1,758	-	-	1,758	-	-	-	26.2	-
(all uses)	1,100	+1,066	-	2,166	-	-	1,758	-	-	408	-	-
Cheese	f/ 300	+43	-	f/ 343	-	-	f/ 343	-	-	-	5.1	-
Whole milk	8,260	-	-	8,260	-	-	8,260	-	-	-	123.1	-
Skimmed milk												
Eggs	357	+95	-	452	-	-	452	-	-	-	6.7	-

	Milk balance					
	Production	Feed	Fresh cons.	For butter	For cheese	Other uses
	1,000 metric tons					
Cow's	24,120)	2,680	8,260	12,750	1,120	250
Goat's	940)					

Office of Foreign Agricultural Relations, partly based on official statistics, partly estimated.

a/ The plus is increase, the minus decrease in stocks, which must be deducted and added, respectively.
b/ Grains in terms of flour; other foodstuffs, retail weight.
c/ Small quantity - neglected.
d/ Included with wheat.
e/ Average 1933/34 - 1936/37.
f/ Of which 200 skimmed milk cheese.

POLAND: Food Balance

Population: Prewar 35,000,000

Foodstuff	Average 1933/34 - 1937/38											
	Supply				Utilization							
	Production	Net trade	Movement of stocks	Total supply	Seed and waste	Feed	Food	Extract. rate	Food in terms of flour	Industrial uses	Consumption of food per person: Gross	Consumption of food per person: Net a/
	1,000 metric tons										Kilograms	
Wheat	2,064	-104	-	1,960	351	81	1,510	73%	1,102	18	43.2	31.5
Rye	6,431	-456	-	5,975	1,158	724	4,026	82%	3,301	67	115.0	94.3
Barley	1,424	-259	-	1,165	256	252	614	70%	430	43	17.5	12.3
Oats	2,563	-51	-	2,512	487	2,025	-	-	-	-	-	-
Corn	93	+3	-	96	5	63	28	79%	22	-	.8	0.6
Rice	-	+43	-	43	-	-	37		37	6	1.1	1.1
Maslin	168	-	-	168	27	-	141	71%	100	-	4.0	2.9
Spelt	-	-	-	-	-	-	-	-	-	-	-	-
Buckwheat / Millet	207) 96)	-9	-	294	42	74	178	75%	134	-	5.1	3.8
Other cereals	-	-	-	-	-	-	-	-	-	-	-	-
Total cereals (incl. rice)	13,046	-833	-	12,213	2,326	3,219	6,534	-	5,126	134	186.7	146.5
Potatoes	33,761	-87	-	33,674	8,227	14,440	10,500	-	-	507	300.00	-
Sugar beets	2,544	-	-	-	-	-	-	-	-	-	-	-
Sugar (refined basis)	380	-80	-	300	-	-	300	-	-	-	8.6	-
Dry legumes	320	-57	-	263	40	-	223	-	-	-	-	6.4
Fresh vegetables	-	-	-	-	-	-	-	-	-	-	-	-
Fruits (in terms of fresh)	-	-	-	-	-	-	-	-	-	-	-	-
Nuts												
Beef	193	-	-	193	-	-	193	-	-	-	5.5	-
Veal	49	-2	-	47	-	-	47	-	-	-	1.3	-
Pork	430	-18	-	412	-	-	412	-	-	-	11.8	-
Mutton and lamb / Rabbit / Goat meat / Horse meat	21	-2	-	19	-	-	19	-	-	-	0.5	-
Poultry	85	-10	-	75	-	-	75	-	-	-	2.1	-
Game	2	-	-	2	-	-	2	-	-	-	.1	-
Meat offals	23	-	-	23	-	-	23	-	-	-	.7	-
Total meat and poultry (carcass weight)	803	-32	-	771	-	-	771	-	-	-	22.0	-
Fish												
Butter	138	-6	-	132	-	-	132	-	-	-	3.8	-
Slaughter fats	155	-6	-	149	-	-	149	-	-	-	4.3	-
Vegetable oils	20	+16	-	36	-	-	36	-	-	-	1.0	-
Fish oils	-	-	-	-	-	-	-	-	-	-	-	-
Total fats and oils	313	+4	-	317	-	-	317	-	-	-	9.1	-
Cheese												
Whole milk	3,700	-	-	3,700	-	-	3,700	-	-	-	105.7	-
Skimmed milk												
Eggs	177	-24	-	153	8	-	145	-	-	-	4.1	-

	Milk balance						
	Production	Feed	Supply	Fresh cons.	For butter	For cheese	Other uses
	1,000 metric tons						
Cow's	9,255	926	8,329	3,697	3,970	662	-

Office of Foreign Agricultural Relations, partly based on official statistics, partly estimated.

a/ Grains in terms of flour; other foodstuffs, retail weight.

CZECHOSLOVAKIA: Food Balance

Population: Prewar 15,100,000

Foodstuff	Average 1933/34 - 1937/38											
	Supply				Utilization							
	Production	Net trade	Movement of stocks a/	Total supply	Seed and waste	Feed	Food	Extract. rate	Food in terms of flour	Industrial uses	Consumption of food per person: Gross	Consumption of food per person: Net b/
	1,000 metric tons										Kilograms	
Wheat	1,589	-20	-	1,569	206	196	1,157	76.3%	883	10	76.6	58.5
Rye	1,634	+38	-	1,672	195	c/ d/ 477 (85)	c/ d/ 980 (1,372)	c/ d/ 69.9% 70%	c/ d/ 685 (960)	20	c/ d/ 64.9 (90.9)	c/ d/ 45.3 (63.5)
Barley	1,100	-50	-	1,050	130	595	45	60%	27	280	3.0	1.8
Oats	1,200	-20	-	1,180	155	1,005	20	60%	12	-	1.3	.8
Corn	270	+125	-	395	14	321	40	80%	32	20	2.7	2.1
Rice	-	+61	-	61	-	1	60	-	60	-	4.0	4.0
Maslin) Spelt)	9	-	-	9	1	2	6	83%	5	-	.4	.3
Buckwheat	2	-	-	2	-	-	2	60%	1	-	.1	.1
Millet	2	-	-	2	-	-	2	60%	1	-	.1	.1
Other cereals	-	-	-	-	-	-	-	-	-	-	-	-
Total cereals (incl. rice)	5,806	+134	-	5,940	701	c/ d/ 2,597 (2,205)	c/ d/ 2,312 (2,704)	- -	c/ d/ 1,706 (1,981)	330	c/ d/ 153.1 (179.1)	c/ d/ 113.0 (131.2)
Potatoes	9,700	-	-	9,700	2,242	4,658	2,200	-	-	600	145.7	-
Sugar beets	4,400	-	-	4,400	-	200	4,200	-	-	-	-	-
Sugar (refined basis)	567	-202	+15	350	-	12	320	-	-	18	21.2	-
Dry legumes	43	+22	-	65	-	17	48	-	-	-	3.2	-
Fresh vegetables	596	+4	-	600	121	-	479	-	-	-	39.7	31.7
Fruits (in terms of fresh)	500	-	-	500	100	-	400	-	-	-	33.1	26.5
Nuts												
Beef	166	-	-	166	-	-	166	-		-	11.0	-
Veal	38	-	-	38	-	-	38	-	-	-	2.5	-
Pork	179	+14.7	-	193.7	-	-	193.7	-	-	-	12.8	-
Mutton and lamb	2.9	+0.3	-	3.2	-	-	3.2	-	-	-	.2	-
Rabbit	13	-	-	13	-	-	13	-	-	-	.9	-
Goat meat	2.1	-	-	2.1	-	-	2.1	-	-	-	.1	-
Horse meat	5	-	-	5	-	-	5	-	-	-	.4	-
Poultry	55	-	-	55	-	-	55	-	-	-	3.6	-
Game	2	-	-	2	-	-	2	-	-	-	.1	-
Meat offals	31	-	-	31	-	-	31	-	-	-	2.1	-
Total meat and poultry (carcass weight)	494	+15	-	509	-	-	509	-	-	-	33.7	-
Fish	3	+18	-	21	-	-	21	-	-	-	1.4	-
Butter	74	-	-	74	-	-	74	-	-	-	4.9	-
Slaughter fats	72	+30	-	102	-	-	96	-	-	6	6.4	-
Vegetable oils	9	+91	-	100	-	-	70	-	-	30	4.6	-
Fish oils	-	+16	-	16	-	-	6	-	-	10	.4	-
Total fats and oils	155	+137	-	292	-	-	246	-	-	46	16.3	-
Cheese	50	-	-	50	-	-	50	-	-	-	3.3	-
Whole milk, cow's	1,900	-	-	1,900	-	-	1,900	-	-	-	125.8)	145.7
goat's	300	-	-	300	-	-	300	-	-	-	19.9)	
Skimmed milk												
Eggs	110	+9	-	119	-	-	119	-	-	-	7.9	-

	Milk balance					
	Production	Feed	Fresh cons.	For butter	For cheese	Other uses
	1,000 metric tons					
Cow's	4,500)	450	2,200	2,100	50	-
Goat's	300)					

Office of Foreign Agricultural Relations, partly based on official statistics, partly estimated.

a/ The plus is increase, the minus decrease in stocks, which must be deducted and added, respectively.
b/ Grains in terms of flour; other foodstuffs, retail weight.
c/ Implied in flour mill statistics.
d/ Assumed if flour mill statistics incomplete.

AUSTRIA: Food Balance

Population: Prewar 6,760,000

Foodstuff	Average 1933/34 - 1937/38											
	Supply				Utilization							
	Production	Net trade	Movement of stocks a/	Total supply	Seed and waste	Feed	Food	Extraction rate	Food in terms of flour	Industrial uses	Consumption of food per person: Gross	Consumption of food per person: Net b/
	1,000 metric tons										Kilograms	
Wheat	393	+246	-	639	55	39	545	77%	420	-	80.6	62.1
Rye	566	+98	-	664	85	56	523	73%	382	-	77.4	56.5
Barley	293	+66	-	359	32	271	1	-	1	55	.1	.2
Oats	452	+24	-	476	55	418	3	-	2	-	.4	.3
Corn	159	+391	-	550	9	521	10	-	9	10	1.5	1.3
Rice	-	+31	-	31	-	-	31	-	28	-	4.6	4.1
Maslin	12	-	-	12	2	5	5	-	4	-	0.7	.6
Spelt	-	-	-	-	-	-	-	-	-	-	-	-
Buckwheat	21	-	-	21	5	4	12	-	9	-	1.8	1.3
Millet	6	-	-	6	1	4	1	-	1	-	.2	.2
Other cereals	-	-	-	-	-	-	-	-	-	-	-	-
Total cereals (incl. rice)	1,902	+856	-	2,758	244	1,318	1,131	-	856	65	167.3	126.6
Potatoes	2,695	+14	-	2,709	589	1,430	600	-	-	90	88.8	84.3
Sugar beets	1,130	-	-	-	-	-	-	-	-	-	-	-
Sugar (refined basis)	160	+2	+2	160	-	-	160	-	-	-	23.7	-
Dry legumes	22	+9	-	31	3	13	15	-	-	-	2.2	-
Fresh vegetables	533	+35	-	568	110	-	458	-	-	-	84.0	67.8
Fruits (in terms of fresh)	391	+161	-	552	138	-	414	-	-	-	81.7	61.2
Nuts	-	-	-	-	-	-	-	-	-	-	-	-
Beef and veal	105	+25	-	130	-	-	130	-	-	-	19.2	-
Pork	163	+45	-	208	-	-	208	-	-	-	30.8	-
Mutton and lamb	4	-	-	4	-	-	4	-	-	-	.6	-
Rabbit	3	-	-	3	-	-	3	-	-	-	.5	-
Goat meat	4	-	-	4	-	-	4	-	-	-	.6	-
Horse meat	7	-	-	7	-	-	7	-	-	-	1.0	-
Poultry	10	-	-	10	-	-	10	-	-	-	1.5	-
Game	3	-	-	3	-	-	3	-	-	-	.4	-
Meat offals	13	-	-	13	-	-	13	-	-	-	1.9	-
Total meat and poultry (carcass weight)	312	+70	-	382	-	-	382	-	-	-	56.5	-
Fish	2.5	+7.5	-	10	-	-	10	-	-	-	1.5	-
Butter	22	-2	-	20	-	-	20	-	-	-	3.0	-
Slaughter fats	55	+14	-	69	-	-	69	-	-	-	10.2	-
Vegetable oils	1	+14	-	15	-	-	15	-	-	-	2.2	-
Fish oils												
Total fats and oils	78	+26	-	104	-	-	104	-	-	-	15.4	-
Cheese	30	-2	-	28	-	-	28	-	-	-	4.1	-
Whole milk, cow's	1,370	-	-	1,370	-	-	1,370	-	-	-	202.6	-
goat's	100	-	-	100	-	-	100	-	-	-	14.8	-
Skimmed milk	40	-	-	40	-	-	40	-	-	-	5.9	-
Eggs	39	+6	-	45	5	-	40	-	-	-	6.7	5.9

	Milk balance							
	Production	Trade	Total	Feed	Fresh cons.	For butter	For cheese	Other uses
	1,000 metric tons							
Cow's	2,530	-92	2,438	268	1,370	500	300	-
Goat's	100	-	100	-	100	-	-	-

Office of Foreign Agricultural Relations, partly based on official statistics, partly estimated.

a/ The plus is increase, the minus decrease in stocks, which must be deducted and added, respectively.
b/ Grains in terms of flour; other foodstuffs, retail weight.

SWITZERLAND: Food Balance

Population: Prewar 4,100,000

Foodstuff	Average 1933/34 - 1937/38											
	Supply				Utilization						Consumption of food per person	
	Production	Net trade	Movement of stocks	Total supply	Seed and waste	Feed	Food	Extract. rate	Food in terms of flour	Industrial uses	Gross	Net a/
	1,000 metric tons										Kilograms	
Wheat	156	+470	-	626	17	63	546	70%	382	-	133.2	93.2
Rye	33	+14	-	47	3	11	33	70%	23	-	8.0	5.6
Barley	8	+135	-	143	1	119	7	70%	5	16	1.7	1.2
Oats	21	+208	-	229	2	210	17	65%	11	-	4.1	2.7
Corn	2	+91	-	93	-	78	15	90%	14	-	3.7	3.4
Rice	-	+15	-	15	-	-	15		15	-	3.7	3.6
Maslin	16	-	-	16	1	-	15	70%	11	-	3.7	2.7
Spelt	27	-	-	27	2	-	25	70%	18	-	6.1	4.4
Buckwheat	-	-	-	-	-	-	-	-	-	-	-	-
Millet	-	-	-	-	-	-	-	-	-	-	-	-
Other cereals	-	-	-	-	-	-	-	-	-	-	-	-
Total cereals (incl. rice)	263	+933	-	1,196	26	481	673	-	479	16	164.2	116.8
Potatoes	734	+46	-	780	161	248	371	-	-	-	90.5	-
Sugar beets	69	-	-	69	-	-	69	15	-	-	-	-
Sugar (refined basis)	8	+149	-	157	-	-	157	-	-	-	38.3	-
Dry legumes	-	+7	-	7	-	-	7	-	-	-	1.7	-
Fresh vegetables	222	+58	-	280	-	-	280	-	-	-	68.3	-
Fruits (in terms of fresh, excl. cider fruit)	383	+91	-	474	-	-	474	-	-	-	115.6	-
Nuts	2	+8	-	10	-	-	10	-	-	-	2.4	-
Beef and veal	100	+5	-	105	-	-	105	-	-	-	25.6	-
Pork	87	+2	-	89	-	-	89	-	-	-	21.7	-
Mutton, lamb, and goat	4	-	-	4	-	-	4	-	-	-	.9	-
Rabbit	-	-	-	-			-		-			
Horse meat	2	-	-	2	-	-	2	-	-	-	.5	-
Poultry	4	+4	-	8	-	-	8	-	-	-	2.0	-
Game	-	-	-	-	-	-	-	-	-	-	-	-
Meat offals	-	-	-	-	-	-	-	-	-	-	-	-
Total meat and poultry (carcass weight)	197	+11	-	208	-	-	208	-	-	-	50.7	-
Fish	2	+6	-	8	-	-	8	-	-	-	2.0	-
Butter	27	+1	-	28	-	-	28	-	-	-	6.8	-
Slaughter fats	12	+4	-	16	-	-	16	-	-	-	3.9	-
Vegetable oils (for food only)	-	+26	-	26	-	-	26	-	-	-	6.4	-
Fish oils	-	-	-	-	-	-	-	-	-	-	-	-
Total fats and oils	39	+31	-	70	-	-	70	-	-	-	17.1	-
Cheese	51	-16	-	35	-	-	35	-	-	-	8.5	-
Whole milk	1,035	-	-	1,035	-	-	1,035	-	-	-	252.4	-
Skimmed milk	-	-	-	-	-	-	-	-	-	-	-	-
Eggs	23	+14	-	37	-	-	37	-	-	-	9.0	-
Cocoa (2), and chocolate (6)	-	+8	-	8	-	-	8	-	-	-	2.0	-
Alcohol	12	+28	-	40	-	-	40	-	-	-	9.8	-

	Milk balance								Skimmed milk			
	Production	Imports	Feed	Supply	Fresh cons.	For butter	For cheese	Other uses	Production	Feed	Food	Other uses
	1,000 metric tons											
Cow's	2,740)	+9	484	2,327	1,035	679	591	22	644	596	-	48
Goat's	62)											

Office of Foreign Agricultural Relations, partly based on official statistics, partly estimated. June 1945.

a/ In terms of flour.

ITALY: Food Balance

Population: Prewar 42,600,000

Foodstuff	Average 1933/34 - 1937/38											
	Supply				Utilization						Consumption of food per person	
	Production	Net trade	Movement of stocks	Total supply	Seed and waste	Feed	Food	Extract. rate	Food in terms of flour	Industrial uses	Gross	Net a/
	1,000 metric tons										Kilograms	
Wheat	7,193	+444	-	7,637	709	-	6,928	80	5,542	-	162.6	130.1
Rye	150	+9	-	159	15	13	131	90	118	-	3.1	2.8
Barley	210	+60	-	270	25	188	47	90	42	10	1.1	1.0
Oats	536	+118	-	654	60	590	-	-	-	4	-	-
Corn	2,946	+157	-	3,103	53	1,684	1,361	92	1,252	5	31.9	29.4
Rice	733	-192	-	541	21	4	514	65	334	2	12.1	7.8
Maslin	-	-	-	-	-	-	-	-	-	-	-	-
Spelt	-	-	-	-	-	-	-	-	-	-	-	-
Buckwheat	-	-	-	-	-	-	-	-	-	-	-	-
Millet	-	-	-	-	-	-	-	-	-	-	-	-
Other cereals	-	-	-	-	-	-	-	-	-	-	-	-
Total cereals (incl. rice)	11,768	+596	-	12,364	883	2,479	8,981	-	7,288	21	210.8	171.1
Potatoes	2,789	-42	-	2,747	423	723	1,601	-	-	-	37.6	-
Sugar beets	2,613	-	-	-	-	-	-	-	-	-	-	-
Sugar (refined basis)	296	+4	-	300	-	-	300	-	-	-	7.0	-
Dry legumes	908	+27	-	935	79	281	575	-	-	-	13.5	-
Fresh vegetables	b/2,601	-336	-	2,265	-	-	2,265	-	-	-	53.2	-
Fruits (in terms of fresh)	1,532	-166	-	1,366	-	-	1,366	-	-	-	32.1	-
Nuts	616	-128	-	488	-	53	435	-	-	-	10.2	-
Citrus fruits	765	-326	-	439	-	-	374	-	-	65	8.8	-
Beef and veal	329	+63	-	392	-	-	392	-	-	-	9.2	-
Pork	224	-5	-	219	-	-	219	-	-	-	5.1	-
Mutton, lamb, and goat	49	-1	-	48	-	-	48	-	-	-	1.1	-
Rabbit	46	-	-	46	-	-	46	-	-	-	1.1	-
Horse meat	13	-	-	13	-	-	13	-	-	-	.3	-
Poultry) Game)	73	+2	-	75	-	-	75	-	-	-	1.8	-
Meat offals	72	+3	-	75	-	-	75	-	-	-	1.8	-
Total meat and poultry (carcass weight)	806	+62	-	868	-	-	868	-	-	-	20.4	-
Fish	178	+78	-	256	-	-	256	-	-	-	6.0	-
Butter	48	+1	-	49	-	-	49	-	-	-	1.1	-
Slaughter fats	184	+3	-	187	-	-	153	-	-	34	3.6	-
Vegetable oils	281	+121	-	402	-	-	277	-	-	125	6.5	-
Fish oils	1	+2	-	3	-	-	-	-	-	3	-	-
Total fats and oils	514	+127	-	641	-	-	479	-	-	162	11.2	-
Cheese	232	-20	-	212	-	-	212	-	-	-	5.0	-
Whole milk	1,555	-	-	1,555	-	-	1,555	-	-	-	36.5	-
Skimmed milk	10	-	-	10	-	-	10	-	-	-	.2	-
Eggs	310	+7	-	317	-	-	317	-	-	-	7.4	-
Cottage cheese	16	-	-	16	-	-	16	-	-	-	.4	-
Alcohol	375	-12	-	363	-	-	363	-	-	-	8.5	-

	Milk balance						Skimmed milk			
	Production	Feed	Fresh cons.	For butter	For cheese	Other uses	Production	Feed	Food	Other uses
	1,000 metric tons									
Cow's	5,832)	1,919	1,555		2,914	11	250	90	10	150
Sheep and goat's	567)									

Office of Foreign Agricultural Relations, partly based on official statistics, partly estimated.

a/ In terms of flour.
b/ Excludes family gardens. If family gardens are included, estimated per capita consumption amounts to 78.5 kilograms.

SPAIN (excluding the Canary Islands): Food Balance

Population: Prewar 23,660,000

Foodstuff	Average 1931/32 - 1935/36											
	Supply				Utilization							
	Production	Net trade	Movement of stocks	Total supply	Seed and waste	Feed	Food	Extract. rate	Food in terms of flour	Industrial uses	Consumption of food per person: Gross	Consumption of food per person: Net a/
	1,000 metric tons										Kilograms	
Wheat	4,350	+58	-	4,408	625	50	3,733	78%	2,912	-	157.8	123.1
Rye	550	-	-	550	80	220	250	75%	188	-	10.6	7.9
Barley	2,385	-1	-	2,384	250	2,004	100	65%	65	30	4.2	2.7
Oats	670	-	-	670	100	560	10	65%	6	-	.4	.3
Corn	703	+136	-	839	20	700	100	90%	90	19	4.2	3.8
Rice	293	-50	-	243	7	-	235	65%	153	1	9.9	6.5
Maslin	26	-	-	26	3	18	5	65%	3	-	.2	.1
Spelt	28	-	-	28	3	1	24	65%	16	-	1.0	.7
Buckwheat	-	-	-	-	-	-	-	-	-	-	-	-
Millet) Other cereals)	11	-3	-	8	1	6	1	-	1	-	.1	-
Total cereals (incl. rice)	9,016	+140	-	9,156	1,089	3,559	4,458	-	3,434	50	188.4	145.1
Potatoes	4,865	-85	-	4,780	1,150	1,380	2,250	-	-	-	95.1	-
Sugar beets	2,150	-	-	-	-	-	-	-	-	-	-	-
Sugar cane	219	-	-	-	-	-	-	-	-	-	-	-
Sugar (refined basis)	300	-	-	300	-	-	300	-	-	-	12.7	-
Dry legumes	529	+28	-	557	60	147	350	-	-	-	-	14.8
Fresh vegetables	2,900	-170	-	2,730	530	-	2,200	-	-	-	-	93.0
Fruits (in terms of fresh)	2,073	-1,018	-	1,055	255	-	800	-	-	-	-	33.8
Nuts (shelled)	208	-31	-	177	-	-	177	-	-	-	7.5	-
Beef and veal	140	-	-	140	-	-	140	-	-	-	5.9	-
Pork	300	-	-	300	-	-	300	-	-	-	12.6	-
Mutton and lamb	95	-	-	95	-	-	95	-	-	-	4.0	-
Rabbit	-	-	-	-	-	-	-	-	-	-	-	-
Goat meat	25	-	-	25	-	-	25	-	-	-	1.1	-
Horse meat	-	-	-	-	-	-	-	-	-	-	-	-
Poultry	30	-	-	30	-	-	30	-	-	-	1.3	-
Game	-	-	-	-	-	-	-	-	-	-	-	-
Meat offals	25	-	-	25	-	-	25	-	-	-	1.1	-
Total meat and poultry (carcass weight)	615	-	-	615	-	-	615	-	-	-	26.0	-
Fish	285	+140	-	425	-	-	425	-	-	-	18.0	-
Butter	7	-	-	7	-	-	7	-	-	-	.3	-
Slaughter fats	75	+15	-	90	-	-	65	-	-	25	2.7	-
Vegetable oils	390	-30	-	360	-	-	285	-	-	75	12.1	-
Fish oils	-	-	-	-	-	-	-	-	-	-	-	-
Total fats and oils	472	-15	-	457	-	-	357	-	-	100	15.1	-
Cheese	35	+1	-	36	-	-	36	-	-	-	1.5	-
Whole milk b/	1,475	+1	-	1,476	-	-	1,476	-	-	-	62.4	-
Skimmed milk	-	-	-	-	-	-	-	-	-	-	-	-
Eggs	95	+30	-	125	-	-	125	-	-	-	5.3	-
Alcohol c/	197	-22	-	175	-	-	175	-	-	-	7.4	-

	Milk balance					
	Production	Feed d/	Fresh cons.	For butter	For cheese	Other uses
	1,000 metric tons					
Cow's	1,800)	350	1,425	115	250	50
Sheep and goat's	390)					

Office of Foreign Agricultural Relations, partly based on official statistics, partly estimated.

a/ Grains in terms of flour, other foodstuffs retail weight.
b/ Includes cream and concentrated milk in terms of whole milk.
c/ Alcohol content of wine and beer.
d/ Excludes quantities fed to lambs and kids.

PORTUGAL: Food Balance

Population: Prewar 6,750,000

Foodstuff	Average 1933/34 - 1937/38											
	Supply				Utilization							
	Production	Net trade	Movement of stocks a/	Total supply	Seed and waste	Feed	Food	Extract. rate	Food in terms of flour	Industrial uses	Consumption of food per person: Gross	Consumption of food per person: Net b/
	1,000 metric tons										Kilograms	
Wheat	472	+29	-40	541	48	-	493	80%	394	-	73.1	58.4
Rye	108	-	-	108	16	-	92	80%	74	-	13.6	11.0
Barley	41	+9	-	50	5	20	13	75%	10	12	1.9	1.5
Oats	91	+4	-	95	14	81	-	-	-	-	-	-
Corn	314	+40	-	354	19	42	293	91%	267	-	43.4	39.5
Rice, incl. broken	62	+20	-	82	3	-	79	72%	57	-	11.7	8.4
Maslin	-	-	-	-	-	-	-	-	-	-	-	-
Spelt	-	-	-	-	-	-	-	-	-	-	-	-
Buckwheat	-	-	-	-	-	-	-	-	-	-	-	-
Millet	-	-	-	-	-	-	-	-	-	-	-	-
Other cereals	-	-	-	-	-	-	-	-	-	-	-	-
Total cereals (incl. rice)	1,088	+102	-40	1,230	105	143	970	-	802	12	143.7	118.8
Potatoes	560	+8	-	568	67	-	501	-	-	-	74.2	-
Sugar beets	-	-	-	-	-	-	-	-	-	-	-	-
Sugar (refined basis)	-	+66	-	66	-	-	66	-	-	-	9.8	-
Dry legumes	95	+3	-	98	14	-	84	-	-	-	-	12.4
Fresh vegetables	546	-6	-	540	-	-	540	-	-	-	80.0	-
Fruits (in terms of fresh)	410	-10	-	400	-	-	400	-	-	-	59.3	-
Nuts	45	-5	-	40	-	-	40	-	-	-	5.9	-
Beef and veal	26	-	-	26	-	-	26	-	-	-	3.8	-
Pork	68	-	-	68	-	-	68	-	-	-	10.1	-
Mutton, lamb, and goat	20	-	-	20	-	-	20	-	-	-	3.0	-
Rabbit	5	-	-	5	-	-	5	-	-	-	.7	-
Horse meat	-	-	-	-	-	-	-	-	-	-	-	-
Poultry and game	9	-1	-	8	-	-	8	-	-	-	1.2	-
Meat offals	12	-	-	12	-	-	12	-	-	-	1.8	-
Total meat and poultry (carcass weight)	140	-1	-	139	-	-	139	-	-	-	20.6	-
Fish	202	-8	-	194	60	-	134	-	-	-	-	19.9
Butter	1	-	-	1	-	-	1	-	-	-	.15	-
Slaughter fats	20	-	-	20	-	-	20	-	-	-	3.0	-
Vegetable oils	64	+17	-	81	-	-	63	-	-	18	9.3	-
Fish oils	1	-	-	1	-	-	-	-	-	1	-	-
Total fats and oils	86	+17	-	103	-	-	84	-	-	19	12.4	-
Cheese	7	-	-	7	-	-	7	-	-	-	1.0	-
Whole milk	49	-	-	49	-	-	49	-	-	-	7.3	-
Skimmed milk	5	-	-	5	-	-	5	-	-	-	.7	-
Eggs	18	-	-	18	-	-	18	-	-	-	2.7	-
Alcohol	92	-10	-	82	-	-	82	-	-	-	12.1	-

	Milk balance						Skimmed milk			
	Production	Feed	Fresh cons.	For butter	For cheese	Other uses	Production	Feed	Food	Other uses
	1,000 metric tons									
Cow's	102)	96	49	31	38	1	25	20	5	-
Sheep and goat's	113)									

Office of Foreign Agricultural Relations, partly based on official statistics, partly estimated.
It should be noted that total grain consumption as given in this table is probably underestimated because of a possible underestimation of production.

a/ The plus is increase, the minus decrease in stocks, which must be deducted and added, respectively.
b/ Grains in terms of flour; other foodstuffs, retail weight.

HUNGARY: Food Balance

Population: Prewar 8,942,359 (1933-37)

Foodstuff	Average 1933/34 - 1937/38											
	Supply				Utilization							
	Production	Net trade	Movement of stocks	Total supply	Seed and waste	Feed	Food	Extract. rate	Food in terms of flour	Industrial uses	Consumption of food per person: Gross	Consumption of food per person: Net a/
	1,000 metric tons										Kilograms	
Wheat	2,206	-503	-	1,703	390	-	1,313	75%	985	-	146.8	110.2
Corn	2,136	+25	-	2,161	137	1,968	44	85%	36	12	4.9	4.0
Rye	727	-82	-	645	150	-	495	75%	372	-	55.4	41.6
Barley	631	-49	-	582	105	424	47	90%	42	6	5.3	4.7
Oats	279	-13	-	266	45	221	-	-	-	-	-	-
Millets, unhulled	8	-3	-	5	1	4	b/	-	-	-	-	-
Buckwheat, "	b/	-	-	b/	-	-	b/	-	-	-	c/	c/
Rice, cleaned	-	+19	-	19	-	-	19	-	-	-	2.1	-
Total cereals (incl. rice)	5,987	-606	-	5,381	828	2,617	1,918	-	1,435	18	214.5	160.5
Potatoes	2,076	-58	-	2,018	616	360	964	-	-	78	107.8	107.8
Sugar (refined)	113	-23	-	90	-	-	90	-	-	-	10.1	-
Honey	2	b/	-	2	-	-	2	-	-	-	.2	-
Dry legumes	95	-29	-	66	9	-	57	-	-	-	6.4	-
Fresh vegetables	482	-44	-	438	-	-	438	-	-	-	49.0	-
Fruits (in terms of fresh)	d/	-36	-	d/	-	-	-	-	-	-	d/	-
Dried fruit	d/	+2	-	d/	-	-	-	-	-	-	d/	-
Nuts	d/	+3	-	d/	-	-	-	-	-	-	d/	-
Beef and veal	54	-1	-	53	-	-	53	-	-	-	5.9	-
Pork	79	-6	-	73	-	-	73	-	-	-	8.2	-
Mutton, lamb, and goat	12	-b/	-	12	-	-	12	-	-	-	1.3	-
Rabbit	1	-	-	1	-	-	1	-	-	-	.1	-
Horsemeat	4	-	-	4	-	-	4	-	-	-	.4	-
Poultry (excl. guinea hens)	40	-21	-	19	-	-	19	-	-	-	2.1	-
Game	d/	-3	-	-	-	-	-	-	-	-	d/	-
Total meat and poultry (carcass weight)	193	-31	-	162	-	-	162	-	-	-	18.1	-
Fish	7	-b/	-	7	-	-	7	-	-	-	.8	-
Butter	9	-4	-	5	-	-	5	-	-	-	.6	-
Slaughter fats	46	-20	-	26	-	-	26	-	-	-	2.9	-
Vegetable oils (edible)	17	-2	-	15	-	b/	15	-	-	-	1.7	-
Fish oils	-	+4	-	4	-	-	4	-	-	-	.4	-
Total fats and oils	71	-21	-	50	-	-	50	-	-	-	5.6	-
Cheese	15	-b/	-	15	-	-	15	-	-	-	1.7	-
Milk	1,228	-b/	-	1,228	-	-	1,228	-	-	-	137.3	-
Cream	3	-b/	-	3	-	-	3	-	-	-	.3	-
Eggs	59	-10	-	49	-	-	49	-	-	-	5.5	-
Cocoa beans, raw	-	+4	-	4	-	-	4	-	-	-	.4	-
Wine	315	-22	-	293	-	-	293	-	-	-	32.8	-
Beer	22	-b/	-	22	-	-	22	-	-	-	2.5	-

	Milk balance						
	Production	Exports	Supply	Fresh cons.	For butter	For cheese	Other uses
	1,000 metric tons						
Cow's	e/1,501)	f/ 108	1,400	1,228	g/ 226	50	4
Sheep's	e/ 7)						

Office of Foreign Agricultural Relations. January 1946.

a/ Grains in terms of flour; other foodstuffs, retail weight.
b/ Less than 500 tons.
c/ Less than .05 kilogram.
d/ Not available.
e/ Net - after allowing for feed.
f/ In whole milk equivalents - included in milk used for butter and cheese.
g/ Includes milk used for cream and cream cheese.

BULGARIA: Food Balance

Population: 1934 - 6,077,939

Foodstuff	Average 1933/34 - 1937/38 a/											
	Supply				Utilization							
	Production	Net trade	Movement of stocks	Total supply	Seed and waste	Feed	Food	Extract. rate	Food in terms of flour	Industrial uses b/	Consumption of food per person: Gross	Consumption of food per person: Net c/
	1,000 metric tons										Kilograms	
Wheat	1,460	-101	-	1,359	293	57	1,009	85%	858	-	166.0	141.2
Corn	896	-79	-	817	65	572	180	85%	153	-	29.6	25.2
Barley	294	-14	-	280	52	210	18	75%	14	-	3.0	2.3
Oats	116	-1	-	115	27	88	-	-	-	-	-	-
Rye	210	-4	-	206	46	16	144	90%	130	-	23.7	21.4
Maslin	124	-	-	124	27	-	97	100%	97	-	16.0	16.0
Spelt	10	-	-	10	2	1	7	85%	6	-	1.2	1.0
Millet	9	-2	-	7	1	2	4	85%	3	-	.5	.5
Rice, cleaned	11	-1	-	10	1	-	9	-	-	-	1.5	1.5
Total cereals (incl. rice)	3,130	-202	-	2,928	514	946	1,468	-	1,261	-	241.5	209.1
Potatoes	108	-1	-	107	39	4	64	-	-	-	10.5	-
Sugar, (refined basis)	19	-1	-	18	-	-	18	-	-	-	3.0	-
Dry legumes	78	-23	-	55	9	-	46	-	-	-	7.5	-
Fresh vegetables	211	-4	-	207	-	-	207	-	-	-	34.0	-
Fruits (in terms of fresh)	526	-43	-	483	-	-	483	-	-	-	79.5	-
Nuts, shelled	6	-1	-	5	-	-	5	-	-	-	.8	-
Beef and veal	25	-3	-	22	-	-	22	-	-	-	3.6	-
Pork	40	-2	-	38	-	-	38	-	-	-	6.3	-
Mutton, lamb, and goat	45	-	-	45	-	-	45	-	-	-	7.4	-
Rabbit and game	1	-	-	1	-	-	1	-	-	-	.1	-
Poultry	18	-4	-	14	-	-	14	-	-	-	2.3	-
Total meat and poultry (carcass weight)	134	-9	-	125	-	-	125	-	-	-	20.5	-
Fish and products	3	+1	-	4	-	-	4	-	-	-	.7	-
Butter	6	-	-	6	-	-	6	-	-	-	1.0	-
Slaughter fats	10	-1	-	9	-	-	9	-	-	-	1.5	-
Vegetable oils	39	-13	-	26	8	-	18	-	-	-	2.9	-
Total fats and oils	55	-14	-	41	8	-	33	-	-	-	5.4	-
Cheese	35	-2	-	33	-	-	33	-	-	-	5.4	-
Milk	496	-	-	496	-	-	496	-	-	-	81.6	-
Eggs	34	-16	-	18	-	-	18	-	-	-	3.0	-
Wine	146	-	-	146	-	-	146	-	-	-	24.0	-

	Milk balance					
	Production d/	Exports	Supply	Fresh cons.	For butter	For cheese
	1,000 metric tons					
Cow's	320	-	-	-	-	-
Buffalo's	117	-	-	-	-	-
Sheep's	289	-	-	-	-	-
Goat's	72	-	-	-	-	-
Total	798	e/ 1	797	496	147	155

Office of Foreign Agricultural Relations.

a/ When data were not available, a less than 5-year average was used.
b/ Included under feed.
c/ In terms of flour.
d/ Net production, after allowance has been made for feed.
e/ Accounted for in figures given for manufactured products.

YUGOSLAVIA: Food Balance

Population: Prewar 14,843,000 (1933-37)

Foodstuff	Average 1933/34 - 1937/38											
	Supply				Utilization							
	Production	Net trade	Movement of supply	Total supply	Seed and waste	Feed	Food	Extract. rate	Food in terms of flour	Industrial uses	Consumption of food per person: Gross	Consumption of food per person: Net a/
	1,000 metric tons										Kilograms	
Wheat	2,350	-155	-	2,195	509	53	1,633	85	1,388	-	110.0	93.5
Rye	209	-3	-	206	57	75	74	90	67	-	5.0	4.5
Corn	4,455	-469	-	3,986	304	1,827	1,855	85	1,577	-	125.0	106.3
Oats	322	-6	-	316	80	236	-	-	-	-	-	-
Rice, cleaned	2	+15	-	17	a/	-	17	-	-	-	1.1	-
Barley	411	-10	-	401	94)							
Maslin	53	-	-	53	15)							
Millet	24	-1	-	23	2)	229	149	90	134	-	10.1	9.0
Spelt	13	+b/	-	13	4)							
Buckwheat	3	-1	-	2	b/)							
Total cereals (incl. rice)	7,842	-630	-	7,212	1,065	2,420	3,728	-	3,166	-	251.2	213.3
Potatoes	1,582	b/	-	1,582	621	-	961	-	-	-	64.7	-
Sugar (refined basis)	66	b/	-	66	-	-	66	-	-	-	4.4	-
Dry legumes	150	-26	-	124	14	-	110	-	-	-	7.4	-
Fresh vegetables	1,658	-2	-	1,656	-	-	1,656	-	-	-	111.6	-
Fruits (in terms of fresh)	1,336	-119	-	1,217	-	-	c/ 587	-	-	-	39.6	-
Dried fruits	-	+6	-	6	-	-	6	-	-	-	.4	-
Nuts, shelled	31	-1	-	30	-	-	30	-	-	-	2.0	-
Olives	26	+b/	-	26	-	-	26	-	-	-	1.8	-
Beef and veal	105	-2	-	103	-	-	103	-	-	-	6.9	-
Pork	131	-6	-	125	-	-	125	-	-	-	8.4	-
Mutton, lamb, and goat	56	b/	-	56	-	-	56	-	-	-	3.8	-
Poultry	29	-11	-	18	-	-	18	-	-	-	1.2	-
Total meat and poultry (carcass weight)	321	-19	-	302	-	-	302	-	-	-	20.3	-
Fish:												
Fresh	5	-2	-	3	-	-	3	-	-	-	.2	-
Prepared	2	-1	-	1	-	-	1	-	-	-	.1	-
Shellfish, in shell	b/	-	-	-	-	-	b/	-	-	-	-	-
Shellfish, without shell	b/	-	-	-	-	-	b/	-	-	-	-	-
Crustaceans	b/	-	-	-	-	-	b/	-	-	-	-	-
Butter	9	b/	-	9	-	-	9	-	-	-	.6	-
Slaughter fats	78	-1	-	77	-	-	77	-	-	-	5.2	-
Vegetable oils	24	+4	-	28	5	-	23	-	-	-	1.5	-
Olive oil	4	-b/	-	4	-	-	4	-	-	-	.3	-
Total fats and oils	115	+3	-	118	5	-	113		-	-	7.6	-
Cheese	100	-2	-	98	-	-	98	-	-	-	6.6	-
Whole milk	1,681	-b/	-	1,681	-	-	1,681	-	-	-	113.2	-
Eggs	49	-9	-	40	-	-	40	-	-	-	2.7	-
Cocoa and chocolate	-	+1	-	1	-	-	1	-	-	-	.1	-
Wine	378	-2	-	376	-	-	376	-	-	-	25.3	-

	Milk balance						
	Production d/	Total	Supply	Fresh cons.	For butter	For cheese	Other uses
	1,000 metric tons						
Cow's	2,021	-	-	-	-	-	-
Goat's	93	-	-	-	-	-	-
Sheep's	260	-	-	-	-	-	-
	2,374	2	2,372	1,681	e/ 218	e/ 475	f/

Office of Foreign Agricultural Relations. January 1946.

a/ In terms of flour.
b/ Less than 500 tons.
c/ 630,000 metric tons have been deducted for use in making wine.
d/ Net, after allowing for feed.
e/ Including manufactured for export.
f/ Included under fresh consumption.

RUMANIA: Food Balance

Population: Prewar 19,096,500 (1933-37)

Foodstuff	Average 1933/34 - 1937/38											
	Supply				Utilization							
	Production	Net trade	Movement of stocks	Total supply	Seed and waste	Feed	Food	Extract. rate	Food in terms of flour	Industrial uses	Consumption of food per person: Gross	Consumption of food per person: Net a/
	1,000 metric tons										Kilograms	
Wheat	3,042	-374	-	2,668	750	-	1,918	85%	1,630	-	100.4	85.4
Corn	5,028	-540	-	4,488	404	1,392	2,692	85%	2,288	-	141.0	119.8
Rye	377	-60	-	317	91	23	203	90%	183	-	10.6	9.6
Buckwheat	3	-	-	3	1	-	2	90%	2	-	.1	.1
Barley	1,242	-395	-	847	346	501	-	-	-	-	-	-
Oats	665	-15	-	650	171	479	-	-	-	-	-	-
Other grains	67	-14	-	53	5	48	-	-	-	-	-	-
Rice	-	+15	-	15	-	-	15	-	-	-	.8	-
Total cereals (incl. rice)	10,424	-1,383	-	9,041	1,768	2,443	4,830	-	4,103	-	252.9	214.8
Potatoes	1,968	-	-	1,963	587	393	983	-	-	-	51.5	-
Sugar (refined basis)	98	-	-	98	-	-	98	-	-	-	5.1	-
Dry legumes	316	-92	-	224	38	-	186	-	-	-	9.7	-
Fresh vegetables	2,862	-	-	2,862	-	1,260	1,602	-	-	-	83.9	-
Fresh fruit	2,070	-14	-	2,056	-	-	2,056	-	-	-	107.7	-
Other fruit b/	-	+9	-	9	-	-	9	-	-	-	.5	-
Nuts	84	-5	-	79	-	-	79	-	-	-	4.1	-
Beef and veal	112	-	-	112	-	-	112	-	-	-	5.9	-
Pork	101	-1	-	100	-	-	100	-	-	-	5.2	-
Mutton, lamb, and goat	85	-	-	85	-	-	85	-	-	-	4.4	-
Poultry	66	-5	-	61	-	-	61	-	-	-	3.2	-
Other meats	-	-1	-	-	-	-	-	-	-	-	-	-
Total meat and poultry (carcass weight)	364	-7	-	358	-	-	358	-	-	-	18.7	-
Fish	17	+5	-	22	-	-	22	-	-	-	1.2	-
Butter	9	-	-	9	-	-	9	-	-	-	.5	-
Slaughter fats	41	-1	-	40	-	-	40	-	-	-	2.1	-
Vegetable oils	110	-28	-	82	c/ 29	-	53	-	-	-	2.8	-
Fish oils	-	+ d/	-	d/	-	-	d/	-	-	-	-	-
Total fats and oils	160	-29	-	131	-	-	102	-	-	-	5.4	-
Cheese	84	-	-	84	-	-	84	-	-	-	4.4	-
Milk	1,813	-	-	1,813	-	-	1,813	-	-	-	94.9	-
Eggs	67	-9	-	58	-	-	58	-	-	-	3.0	-
Wine	881	-	-	881	-	-	881	-	-	-	46.1	-

	Milk balance						
	Production	Exports	Feed	Supply	Fresh cons.	For butter	For cheese
	1,000 metric tons						
Cow's, buffalo's, goat's, sheep's	3,193	e/ -2	738	2,453	1,813	221	421

Office of Foreign Agricultural Relations.

a/ In terms of flour.
b/ Includes dried fruit, olives, and cocoa beans.
c/ Includes some oil equivalent used for feed.
d/ Less than 500 tons.
e/ Accounted for in figures given for manufactured products.

GREECE: Food Balance

Population: 6,792,720 (1935)

Foodstuff	Average 1933/34 - 1937/38											
	Supply				Utilization							
	Production	Net trade	Movement of stocks	Total supply	Seed and waste	Feed	Food	Extract. rate	Food in terms of flour	Industrial uses a/	Consumption of food per person: Gross	Consumption of food per person: Net b/
	1,000 metric tons										Kilograms	
Wheat	712	+427	-	1,139	197	5	937	85%	797	-	137.9	117.3
Corn	257	+44	-	301	20	177	104	85%	88	-	15.3	13.0
Barley	198	+7	-	205	48	143	14	70%	10	-	2.1	1.5
Oats	112	+2	-	114	30	84	0	-	-	-	-	-
Rye	59	-	-	59	16	1	42	90%	38	-	6.2	5.6
Maslin	38	-	-	38	13	4	21	100%	21	-	3.1	3.1
Millet	2	+c/	-	2	c/	1	1	-	1	-	-	-
Rice, milled	1	+28	-	29	c/	-	29	-	-	-	4.3	-
Total grains (incl. rice)	1,379	+508	-	1,887	324	415	1,148	-	955	-	168.9	140.5
Potatoes	130	+5	-	135	41	-	94	-	-	-	13.8	-
Sugar (refined basis)	-	-	-	-	-	-	-	-	-	-	-	-
Dry legumes	69	+20	-	89	9	-	80	-	-	-	11.8	-
Fresh vegetables	357	+2	-	359	-	-	359	-	-	-	52.9	-
Fruits (in terms of fresh)	159	-17	-	142	-	-	142	-	-	-	20.9	-
Dried fruits	217	-117	-	100	-	-	100	-	-	-	14.7	-
Nuts	46	-17	-	29	-	-	29	-	-	-	4.3	-
Beef and veal	15	+9	-	24	-	-	24	-	-	-	3.5	-
Pork	12	+c/	-	12	-	-	12	-	-	-	1.8	-
Mutton, lamb, and goat	61	+11	-	72	-	-	72	-	-	-	10.6	-
Rabbit	1	-	-	1	-	-	1	-	-	-	.1	-
Poultry	12	+o/	-	12	-	-	12	-	-	-	1.8	-
Total meat and poultry (carcass weight)	101	+20	-	121	-	-	121	-	-	-	17.8	-
Fish	16	+19	-	35	-	-	35	-	-	-	5.2	-
Butter	5	+o/	-	5	-	-	5	-	-	-	.7	-
Slaughter fats	-	-	-	-	-	-	-	-	-	-	-	-
Vegetable oils (incl. olive oil)	121	-9	-	112	-	-	112	-	-	-	16.5	-
Total fats and oils	126	-9	-	117	-	-	117	-	-	-	17.2	-
Cheese	58	-c/	-	58	-	-	58	-	-	-	8.5	-
Milk	269	+4	-	273	-	-	273	-	-	-	40.2	-
Eggs	23	+1	-	24	-	-	24	-	-	-	3.5	-
Wine	300	-48	-	252	-	-	252	-	-	-	37.1	-
Olives (table)	35	-14	-	21	-	-	21	-	-	-	3.1	-

	Milk balance					
	Production	Imports	Supply	Fresh cons.	For butter	For cheese
	1,000 metric tons					
Cow's	114	-	-	-	-	-
Buffalo's	25	-	-	-	-	-
Sheep's	306	-	-	-	-	-
Goat's	218	-	-	-	-	-
Total	663	10	673	273	126	274

Office of Foreign Agricultural Relations. January 1946.

a/ Included under feed.
b/ In terms of flour.
c/ Less than 500 tons.
d/ Net - after allowance for feed.

CONTINENTAL EUROPE: Consumption of food per person, average 1933/34 - 1937/38

Kilograms

Foodstuff	Austria Gross	Austria Net b/	Belgium Gross	Belgium Net b/	Bulgaria Gross	Bulgaria Net b/	Czechoslovakia Gross	Czechoslovakia Net b/	Denmark Gross	Denmark Net b/	Finland Gross	Finland Net b/	France Gross	France Net o/
Cereals (incl. rice)	167.3	126.6	167.1	125.8	241.5	209.1	c/153.1 d/179.1	o/113.0 d/131.2	122.0	96.7	174.5	149.2	184.2	134.8
Potatoes	88.8	84.3	151.3	-	10.5	-	145.7	-	98.5	-	182.1	-	119.3	-
Sugar (refined basis)	23.7	-	27.9	-	3.0	-	21.2	-	49.9	-	28.6	-	23.0	-
Dry legumes	2.2	-	3.0	-	7.5	-	3.2	-	.5	-	3.4	-	-	6.2
Fresh vegetables	84.0	67.8	48.0	-	34.0	-	39.7	31.7	39.9	33.4	19.9	-	-	97.8
Fruits (in terms of fresh)	81.7	61.2	32.1	-	79.5	-	33.1	26.5	30.2	-	12.3	-	-	26.2
Citrus fruit	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Dried fruit	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Nuts	-	-	-	-	.8	-	-	-	-	-	-	-	3.7	-
Olives	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Beef and veal	19.2	-	17.8	-	3.6	-	13.4	-	28.8	-	17.9	-	20.4	-
Pork	30.8	-	20.2	-	6.3	-	17.0	-	31.6	-	12.3	-	13.0	-
Mutton and lamb	.6	-	.5	-	b/ 7.4	-	)	-	1.1	-	1.4	-	2.5	-
Rabbit	.5	-	-	-	i/ .1	-	)	-	-	-	-	-	2.9	-
Goat meat	.6	-	) 1.9	-	k/	-	) 2.7	-	-	-	-	-	k/	-
Horse meat	1.0	-	)	-	-	-	)	-	-	-	-	-	1.1	-
Poultry	1.5	-	)	-	2.3	-	5.1	-	3.2	-	.6	-	4.3	-
Game	.4	-	) 5.4	-	l/	-	.1	-	-	-	-	-	-	-
Meat offals	1.9	-	-	-	-	-	.9	-	3.5	-	-	-	2.1	-
Total meat and poultry (carcass weight)	56.5	-	45.8	-	20.5	-	39.2	-	68.2	-	32.2	-	46.3	-
Fish	1.5	-	11.2	-	.7	-	1.4	-	14.8	-	9.5	-	8.5	-
Butter	3.0	-	8.3	-	1.0	-	4.9	-	8.9	-	9.5	-	5.3	-
Slaughter fats	10.2	-	5.1	-	1.5	-	6.4	-	2.2	-	1.1	-	3.6	-
Vegetable oils	2.2	-	5.9	-	2.9	-	4.6	-	11.3	-	2.8	-	8.1	-
Fish oils	-	-	.5	-	-	-	.4	-	3.8	-	-	-	.1	-
Total fats and oils	15.4	-	19.8	-	5.4	-	16.3	-	26.2	-	13.4	-	17.1	-
Cheese	4.1	-	5.9	-	5.4	-	3.3	-	5.7	-	.8	-	6.7	-
Whole milk	217.4	-	79.2	-	) 81.6	-	145.7	-	175.4	-	277.3	-	p/84.7	-
Skimmed milk	5.9	-	-	-	)	-	-	-	13.5	-	-	-	6.0	-
Eggs	6.7	5.9	11.4	-	3.0	-	7.9	-	8.1	-	2.8	-	9.0	-
Cottage cheese	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Cocoa	.6	-	1.1	-	-	-	-	-	-	-	-	-	-	-
Alcohol	.5	-	.6	-	-	-	-	-	-	-	-	-	s/21.5	-
Beer	34.0	-	171.2	-	-	-	-	-	-	-	-	-	-	-
Wine	-	-	-	-	24.0	-	-	-	-	-	-	-	-	-
Calories per person per day, excluding alcoholic beverages	u/2,850		2,800		-		v/2,500 w/2,700		3,200		3,100		2,800	
Calories per person per day, including alcoholic beverages	2,900		3,000		2,650		-		-		-		3,200	

Foodstuff	Germany Gross	Germany Net b/	Greece Gross	Greece Net b/	Hungary Gross	Hungary Net b/	Italy Gross	Italy Net b/	Netherlands Gross	Netherlands Net b/	Norway Gross	Norway Net b/	Poland Gross	Poland Net b/
Cereals (incl. rice)	142.1	107.8	168.9	140.5	214.5	160.5	210.8	171.1	136.5	101.8	142.3	103.7	186.7	146.5
Potatoes	189.0	-	13.8	-	107.8	107.8	37.6	-	130.0	-	117.4	-	300.0	-
Sugar (refined basis)	21.6	-	9.7	-	10.1	-	7.0	-	34.0	-	33.3	-	8.6	-
Dry legumes	2.3	-	11.8	-	6.4	-	13.5	-	2.9	-	2.8	-	-	6.4
Fresh vegetables	57.0	48.3	52.9	-	49.0	-	f/53.2	-	71.8	-	28.1	23.9	-	-
Fruits (in terms of fresh)	48.1	41.8	20.9	-	-	-	32.1	-	61.2	-	33.7	29.5	-	-
Citrus fruit	-	-	-	-	-	-	8.8	-	-	-	-	-	-	-
Dried fruit	-	-	14.7	-	-	-	-	-	-	-	-	-	-	-
Nuts	-	-	4.3	-	-	-	10.2	-	1.5	-	-	-	-	-
Olives	-	-	3.1	-	-	-	-	-	-	-	-	-	-	-
Beef and veal	15.7	14.1	3.5	-	5.9	-	9.2	-	16.2	-	14.6	-	6.8	-
Pork	26.3	23.7	1.8	-	8.2	-	5.1	-	18.5	-	13.5	-	11.8	-
Mutton and lamb	.5	.5	h/10.6	-	h/ 1.3	-	1.1	-	.8	-	5.6	-	)	-
Rabbit	.8	.7	.1	-	.1	-	1.1	-	-	-	) 2.1	-	)	-
Goat meat	-	-	k/	-	r/	-	k/	-	) .4	-	)	-	) .5	-
Horse meat	.2	.1	1.8	-	.4	-	.3	-	)	-	.7	-	)	-
Poultry	1.5	1.4	-	-	2.1	-	) 1.8	-	2.7	-	1.0	-	2.1	-
Game	.4	.3	-	-	-	-	)	-	-	-	m/	-	.1	-
Meat offals	1.7	1.5	-	-	-	-	1.8	-	2.2	-	.7	-	.7	-
Total meat and poultry (carcass weight)	n/47.5	n/42.7	17.8	-	18.1	-	20.4	-	40.8	-	38.2	-	22.0	-
Fish	11.5	-	5.2	-	.8	-	6.0	-	11.3	-	38.5	-	-	-
Butter	8.1	-	.7	-	.6	-	1.1	-	6.3	-	6.9	-	3.8	-
Slaughter fats	8.8	-	-	-	2.9	-	3.6	-	5.2	-	2.1	-	4.3	-
Vegetable oils	9.3	-	16.5	-	1.7	-	6.5	-	10.2	-	10.8	-	1.0	-
Fish oils	-	-	-	-	.4	-	-	-	1.9	-	3.8	-	-	-
Total fats and oils	26.2	-	17.2	-	5.6	-	11.2	-	23.6	-	23.6	-	9.1	-
Cheese	o/ 5.1	-	8.5	-	1.7	-	5.0	-	7.3	-	7.6	-	-	-
Whole milk	123.1	-	) 40.2	-	) 137.3	-	36.5	-	130.4	-	177.1	-	105.7	-
Skimmed milk	-	-	)	-	)	-	.2	-	-	-	20.1	-	-	-
Eggs	6.7	-	3.5	-	5.5	-	7.4	-	8.5	-	6.9	-	4.1	-
Cottage cheese	-	-	-	-	-	-	.4	-	-	-	-	-	-	-
Cocoa	-	-	-	-	.4	-	-	-	.2	-	-	-	-	-
Alcohol	.4	-	-	-	-	-	8.5	-	.9	-	-	-	-	-
Beer	57.2	-	-	-	2.5	-	-	-	16.0	-	-	-	-	-
Wine	-	-	37.1	-	32.8	-	-	-	-	-	-	-	-	-
Calories per person per day, excluding alcoholic beverages	2,850		2,850		-		x/2,550		2,800		2,900		2,550	
Calories per person per day, including alcoholic beverages	-		2,450		2,600		2,700		2,850		-		-	

Foodstuff	Portugal Gross	Portugal Net b/	Rumania Gross	Rumania Net b/	Spain a/ Gross	Spain a/ Net b/	Sweden Gross	Sweden Net b/	Switzerland Gross	Switzerland Net b/	Yugoslavia Gross	Yugoslavia Net b/
Cereals (incl. rice)	e/143.7	e/118.8	252.9	214.8	188.4	145.1	127.4	99.8	164.2	116.8	251.2	213.3
Potatoes	74.2	-	51.5	-	95.1	-	137.6	-	90.5	-	64.7	-
Sugar (refined basis)	9.8	-	5.1	-	12.7	-	43.0	-	38.3	-	4.4	-
Dry legumes	-	12.4	9.7	-	-	14.8	1.8	-	1.7	-	7.4	-
Fresh vegetables	80.0	-	83.9	-	-	93.8	21.0	17.6	68.3	-	111.6	-
Fruits (in terms of fresh)	59.3	-	107.7	-	-	33.8	33.6	29.6	115.6	-	39.6	-
Citrus fruit	-	-	-	-	-	-	-	-	-	-	-	-
Dried fruit	-	-	g/ .5	-	-	-	-	-	-	-	.4	-
Nuts	-	-	4.1	-	7.5	-	-	-	2.4	-	2.0	-
Olives	-	-	-	-	-	-	-	-	-	-	1.8	-
Beef and veal	3.8	-	5.9	-	5.9	-	16.8	-	25.6	-	6.9	-
Pork	10.1	-	5.2	-	12.6	-	22.1	-	21.7	-	8.4	-
Mutton and lamb	3.0	-	b/ 4.4	-	4.0	-	.6	-	.9	-	b/ 3.8	-
Rabbit	.7	-	-	-	-	-	-	-	-	-	-	-
Goat meat	-	-	-	-	1.1	-	-	-	k/	-	k/	-
Horse meat	-	-	-	-	-	-	1.0	-	.5	-	-	-
Poultry	) 1.2	-	3.2	-	1.3	-	1.6	-	2.0	-	1.2	-
Game	)	-	-	-	-	-	-	-	-	-	-	-
Meat offals	1.8	-	-	-	1.1	-	1.6	-	-	-	-	-
Total meat and poultry (carcass weight)	20.6	-	18.7	-	26.0	-	43.7	-	50.7	-	20.3	-
Fish	-	19.9	1.2	-	18.0	-	22.4	-	2.0	-	.3	-
Butter	.15	-	.5	-	.3	-	8.6	-	6.8	-	.6	-
Slaughter fats	3.0	-	2.1	-	2.7	-	2.2	-	3.9	-	5.2	-
Vegetable oils	9.3	-	2.8	-	12.1	-	5.1	-	6.4	-	1.8	-
Fish oils	-	-	-	-	-	-	2.1	-	-	-	-	-
Total fats and oils	12.45	-	5.4	-	15.1	-	18.0	-	17.1	-	7.6	-
Cheese	1.0	-	4.4	-	1.5	-	6.1	-	8.5	-	6.6	-
Whole milk	7.3	-	) 94.9	-	g/62.4	-	238.3	-	252.4	-	113.2	-
Skimmed milk	.7	-	)	-	-	-	27.2	-	-	-	-	-
Eggs	2.7	-	3.0	-	5.3	-	7.5	-	9.0	-	2.7	-
Cottage cheese	-	-	-	-	-	-	-	-	-	-	-	-
Cocoa	-	-	-	-	-	-	-	-	r/ 2.0	-	r/ .1	-
Alcohol	t/12.1	-	-	-	t/ 7.4	-	-	-	s/ 9.8	-	-	-
Beer	-	-	-	-	-	-	-	-	-	-	-	-
Wine	-	-	46.1	-	-	-	-	-	-	-	25.3	-
Calories per person per day, excluding alcoholic beverages	e/2,100		-		2,650		3,000		3,150		-	
Calories per person per day, including alcoholic beverages	e/2,300		2,750		2,800		-		3,300		2,700	

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a/ Average 1931/32 - 1935/36.
b/ Grains in terms of flour; other foodstuffs, retail weight.
c/ Implied in flour-mill statistics.
d/ Assumed if flour-mill statistics incomplete.
e/ It should be noted that grain consumption, as given in this table and derived from the detailed food balances, is probably underestimated because of possible underestimation of production. As a result, total calorie intake as here given would also seem to be somewhat understated.
f/ Excludes family gardens. If family gardens are included, estimated per capita consumption amounts to 78.5 kilograms.
g/ Includes olives and cocoa beans.
h/ Includes goat meat.
i/ Includes other game.
k/ Included with mutton and lamb.
l/ Included with rabbit.
m/ Included with rabbit and goat meat.
n/ Average 1933/34 - 1936/37.
o/ Of which 3.0 kilograms skimmed milk cheese.
p/ Includes cream and processed milk in terms of fresh.
q/ Includes cream and concentrated milk in terms of whole milk.
r/ Including chocolate.
s/ Alcohol content of wine, beer, and cider.
t/ Alcohol content of wine and beer.
u/ Previous calculation 2,800 (difference accounted for by calorie values).
v/ With allowance of rye consumption as per footnote c/.
w/ With allowance of rye consumption as per footnote d/.
x/ Previous calculation 2,600 (difference accounted for by calorie values).